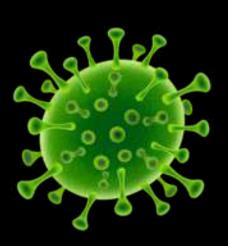


COVID-19 EFFECT INSIGHTS MARCH - April 2020

ACOVID-19 Story



Beyond social disruption, the Coronavirus epidemic is, above all, a human tragedy and a global health crisis. This puzzling epidemic has changed our daily routines and has posed sharp economic risks. In this deck, we aim to shed a light on the escalating impact the Coronavirus has on the global economy and our industry as well as give the reader perspective on the constantly changing situation.



- 05 GENERAL INSIGHTS
- 15 IMPACT ON CONSUMER BEHAVIOR (MENA)
 - INTERESTS
 - PLATFORMS CONSUMPTION
- 40 IMPACT ON SPENDING BEHAVIOR
- 45 SHIFT IN CONTENT
 - PEOPLE AROUND THE WORLD
 - WHAT DID BRANDS DO?



GENERAL Insights



THE WORLD'S MOST TALKED ABOUT TOPIC **GLOBALLY**



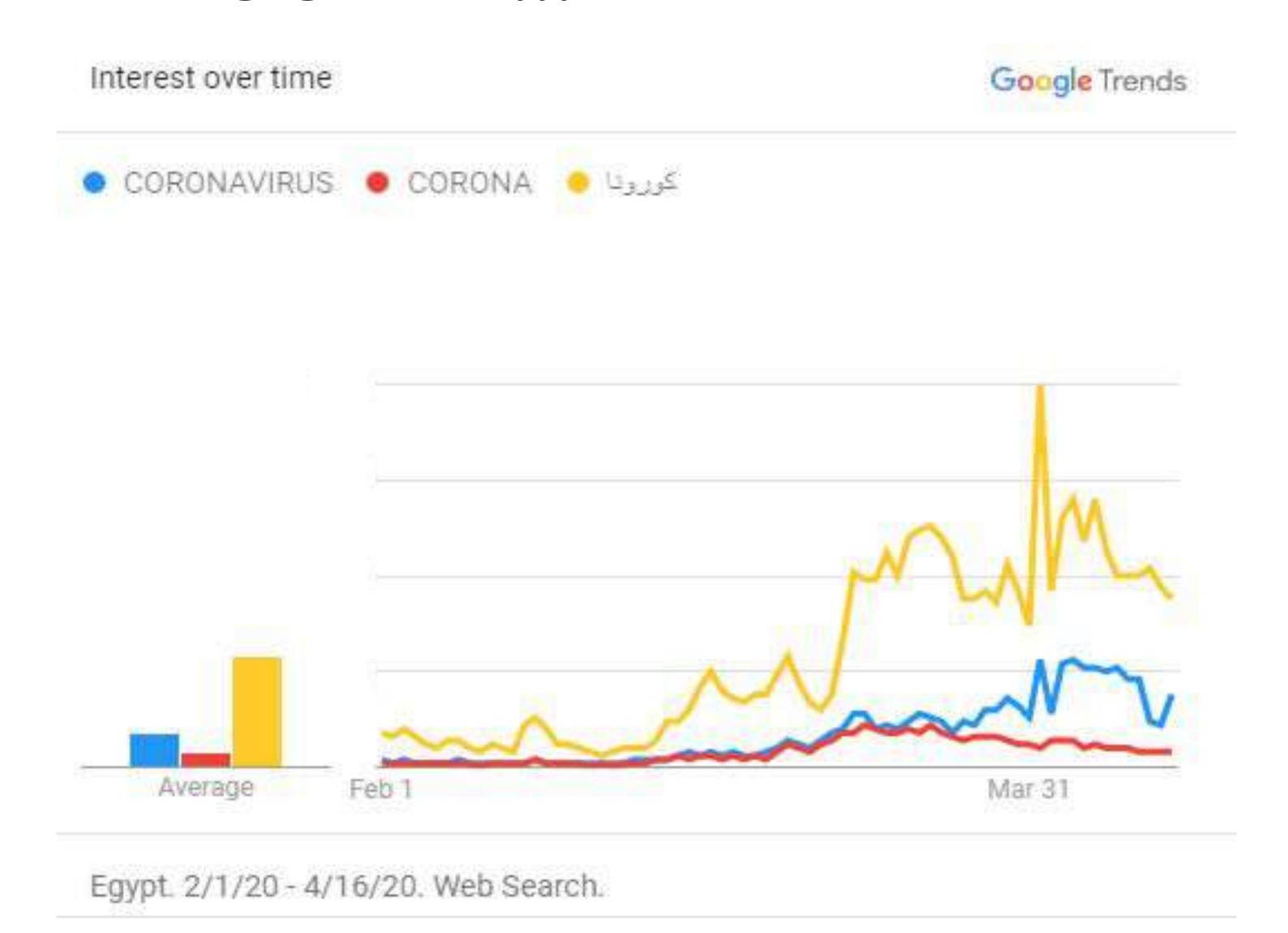


Where the Coronavirus search query has been most popular - Feb & March 2020

^{*} Queries with the biggest increase in search frequency since the last time period (previous 2 months)



AND LOCALLY...



9th of March till 1st of April

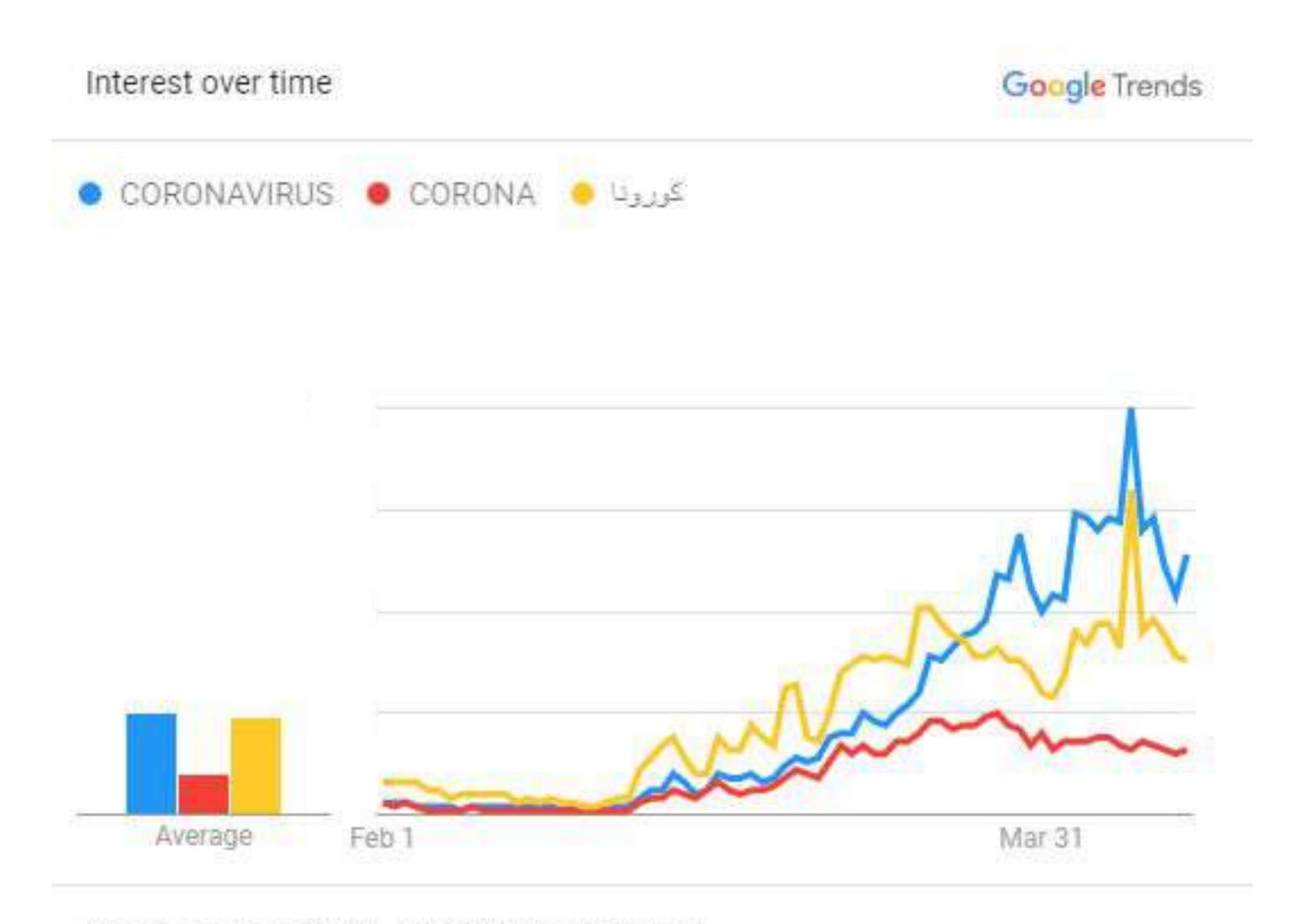
245 کورونا SROWTH %

300 CORONAVIRUS GROWTH %

> -16 CORONA GROWTH %



AND LOCALLY...



9th of March till 8th of April

150 کورونا SROWTH %

614 CORONAVIRUS GROWTH %

> 45 CORONA GROWTH %

Saudi Arabia. 2/1/20 - 4/16/20. Web Search.



TAKING OVER THE CONVERSATIONS

4.8M Tweets

5.5% of all tweets in KSA

1M Tweets

9.8% of all tweets in UAE

787K Tweets

8.8% of tweets in Kuwait

1M Tweets

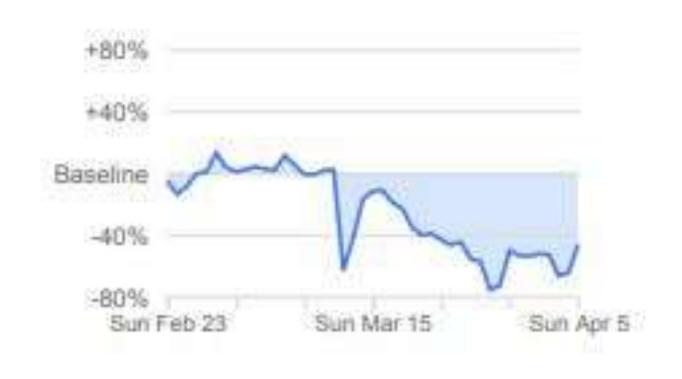
4.7% of all tweets in Egypt



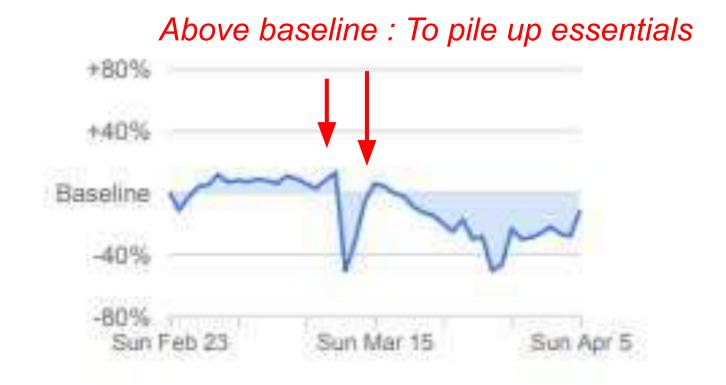
A GOOGLE REPORT FOR MOBILITY CHANGES WITHIN LOCAL COMMUNITIES



compared to baseline



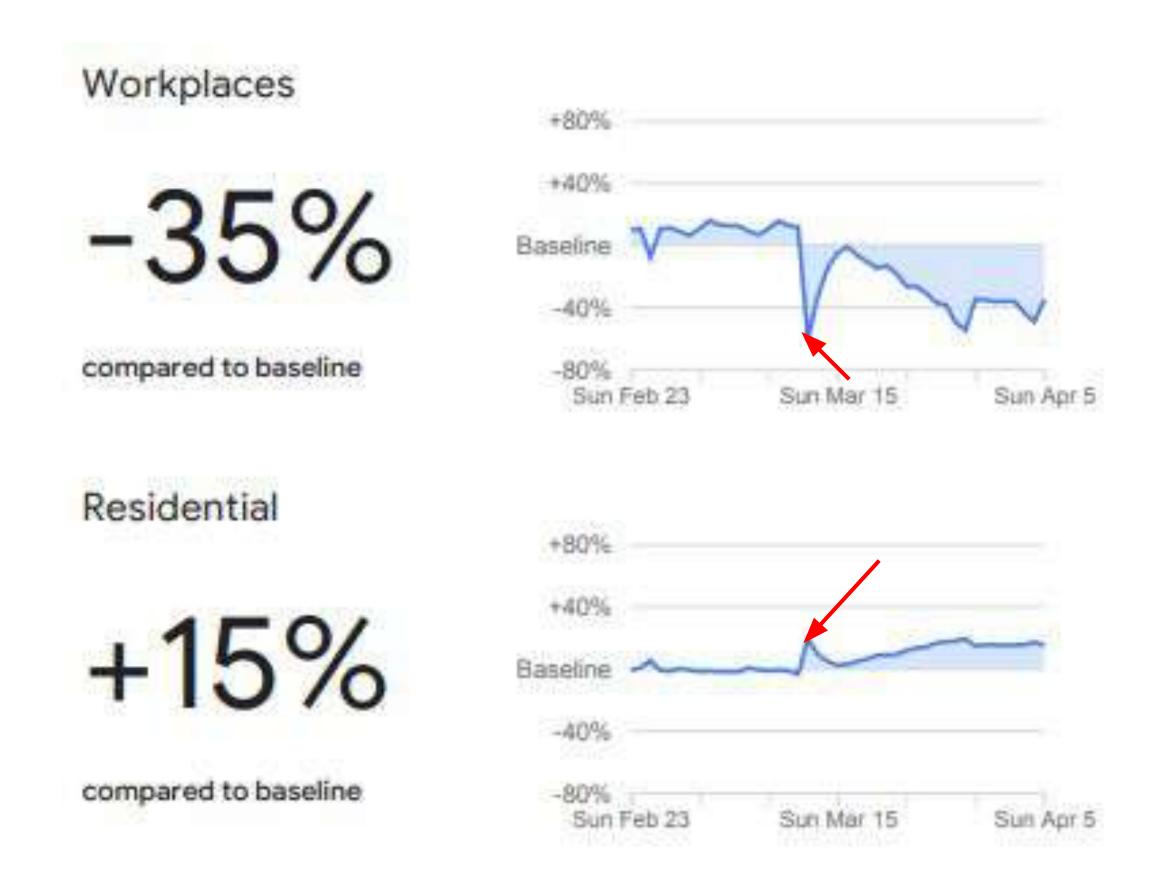
Mobility trends for places like restaurants, cafes, shopping centers, theme parks, museums, libraries, and movie theaters.



Mobility trends for places like grocery markets, food warehouses, farmers markets, specialty food shops, drug stores, and pharmacies.



A GOOGLE REPORT FOR MOBILITY CHANGES WITHIN LOCAL COMMUNITIES

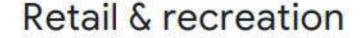


Mobility trends for places of work.

Mobility trends for places of residence.

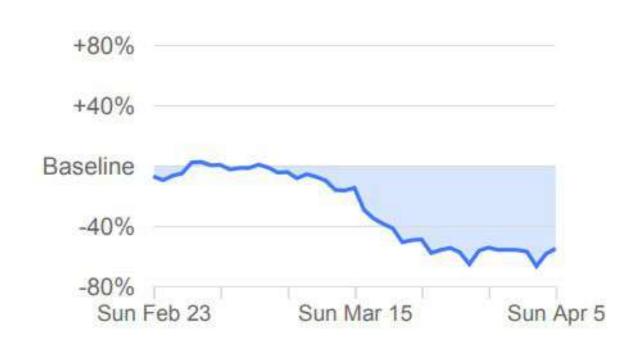


A GOOGLE REPORT FOR MOBILITY CHANGES WITHIN LOCAL COMMUNITIES



-55%

compared to baseline



Mobility trends for places like restaurants, cafes, shopping centers, theme parks, museums, libraries, and movie theaters.

Grocery & pharmacy

-24%

compared to baseline



Mobility trends for places like grocery markets, food warehouses, farmers markets, specialty food shops, drug stores, and pharmacies.

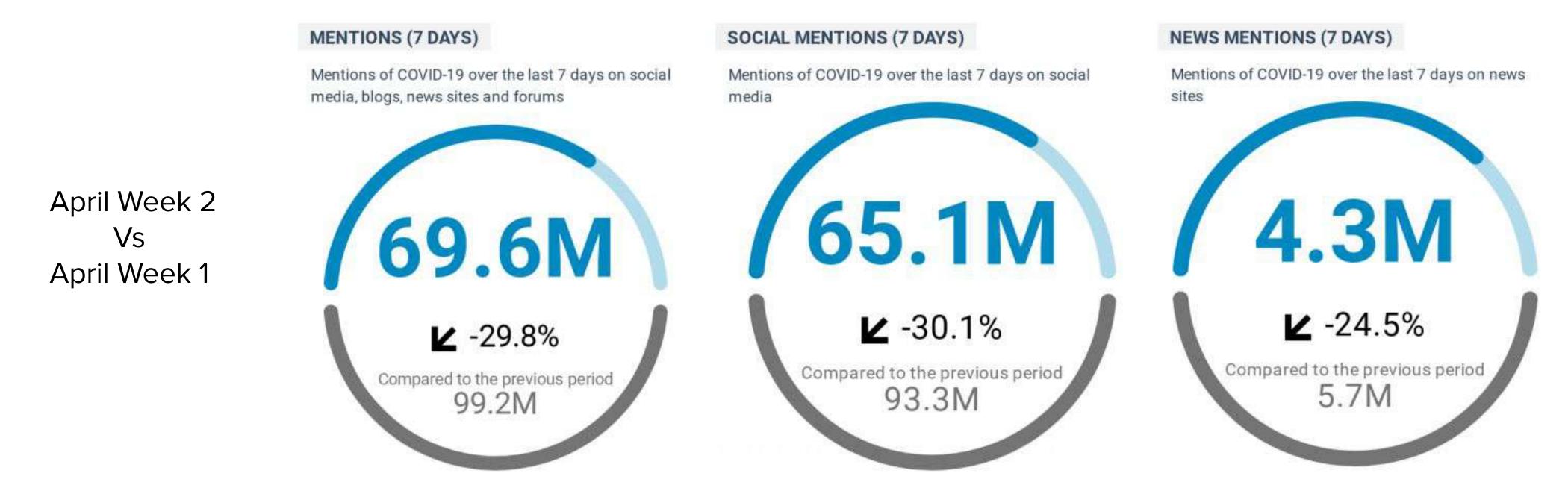


A GOOGLE REPORT FOR MOBILITY CHANGES WITHIN LOCAL COMMUNITIES



Source: COVID-19 Community Mobility Report, Saudi Arabia April 6, 2020

SOON ENOUGH.. WE STARTED LOSING INTEREST IN THE TOPIC



As soon as Coronavirus was officially a global health crisis, we saw an increase in interest about the topic on every platform. The trend has reached its peak and the peak period was now over. We noticed a drop in the overall mentions of COVID-19 over the past period so it is clear that people are losing interest in coronavirus news and their interest is shifting towards other topics.

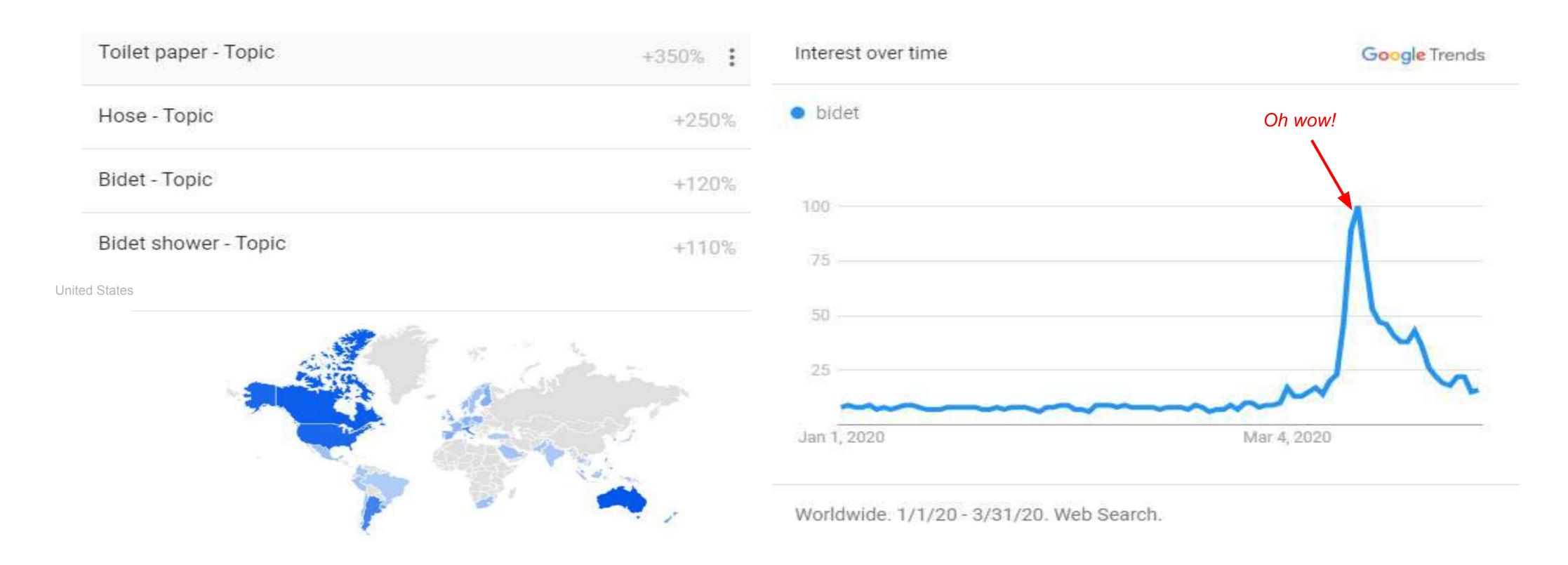


MPACT ON Consumer Behavior

IMPACT ON Interests



TIME OF NEED...

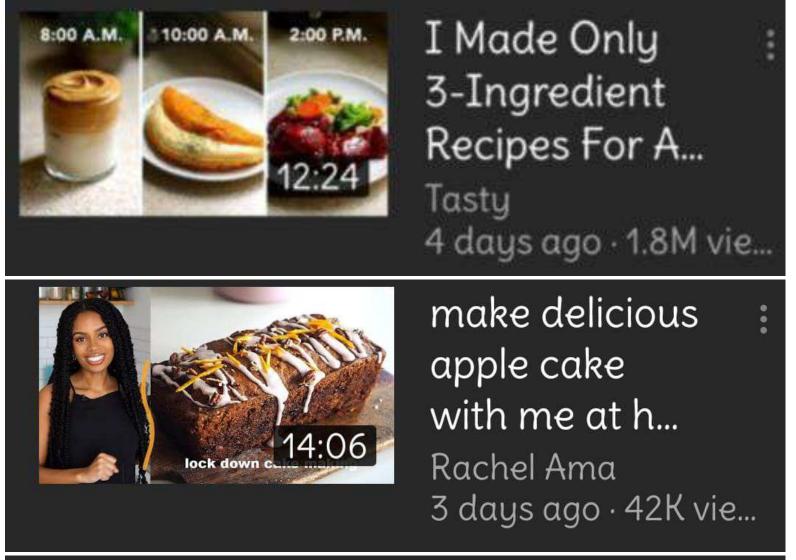


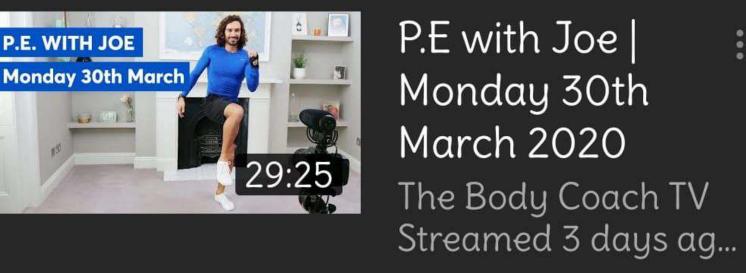
People's interests changed this past period. There was a shortage in toilet paper as people started stockpiling this specific item fearing they'd run out of it during the lockdown. Highly searched topics also involved cleaning products & home supplies.

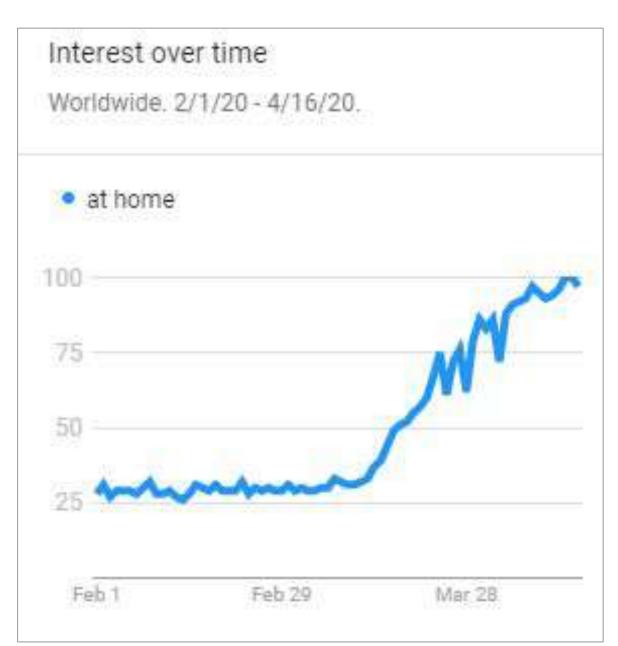


"AT HOME" VIDEOS EVERYWHERE

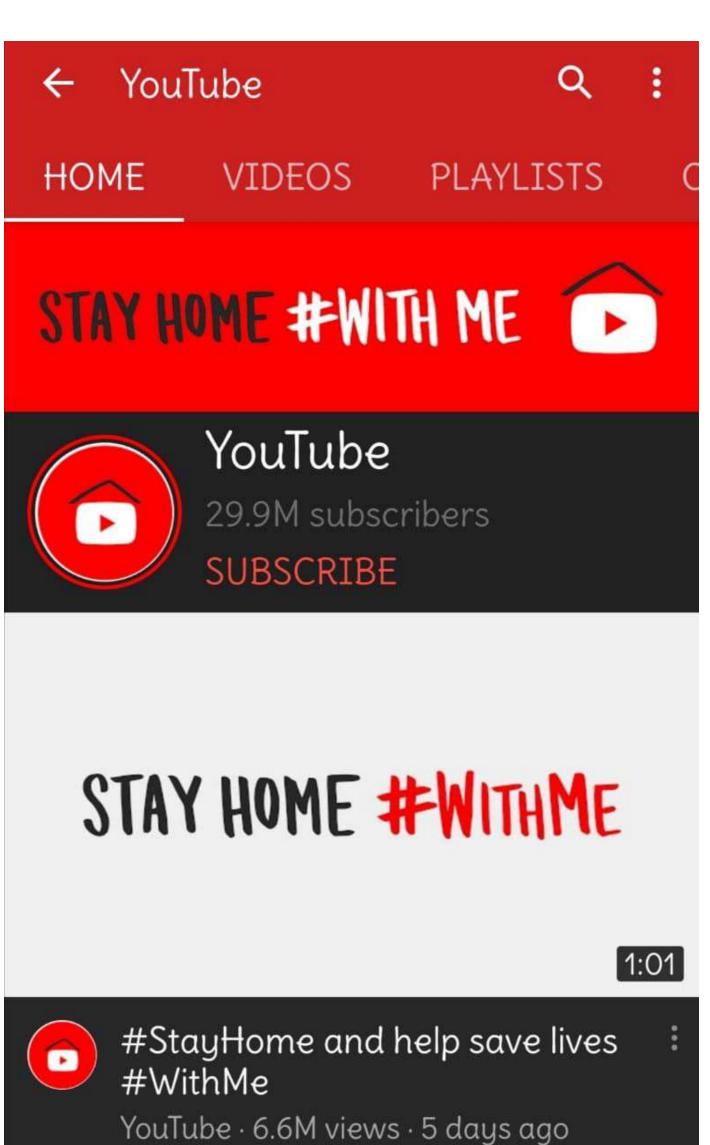
YouTube searches for "At Home" content grew tremendously, users want to consume more content to help them workout, cook and even meditate at home, capitalizing on the #Staryathome & #WithMe trends.





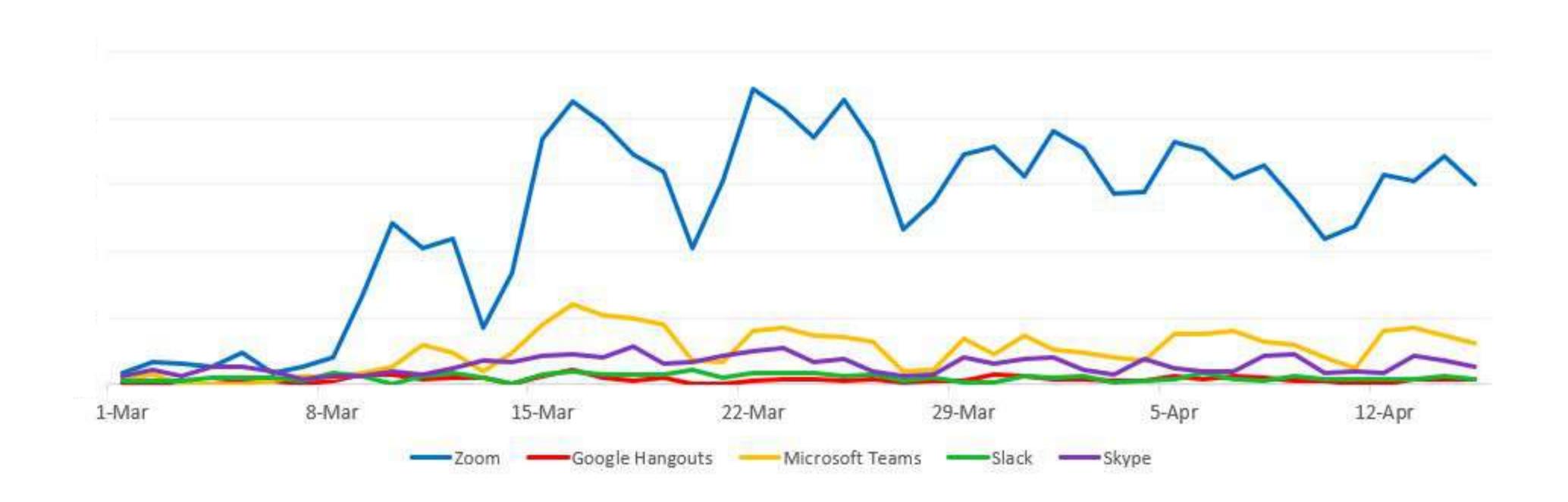








AS PEOPLE & BUSINESSES TRY TO STAY CONNECTED

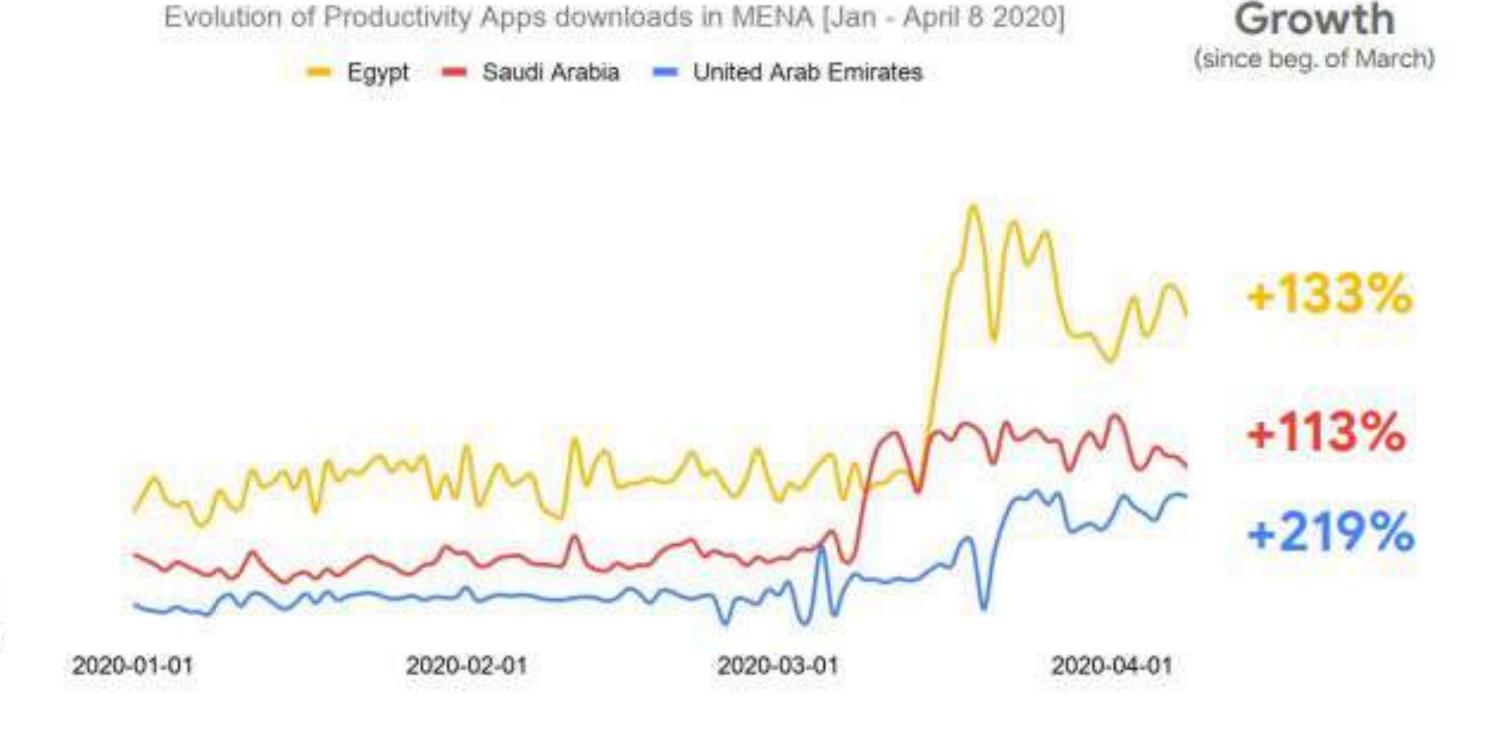


PRODUCTIVITY APPS USAGE PICKING UP



800%+

Increase in searches on Working From Home Tips in the first three weeks of March

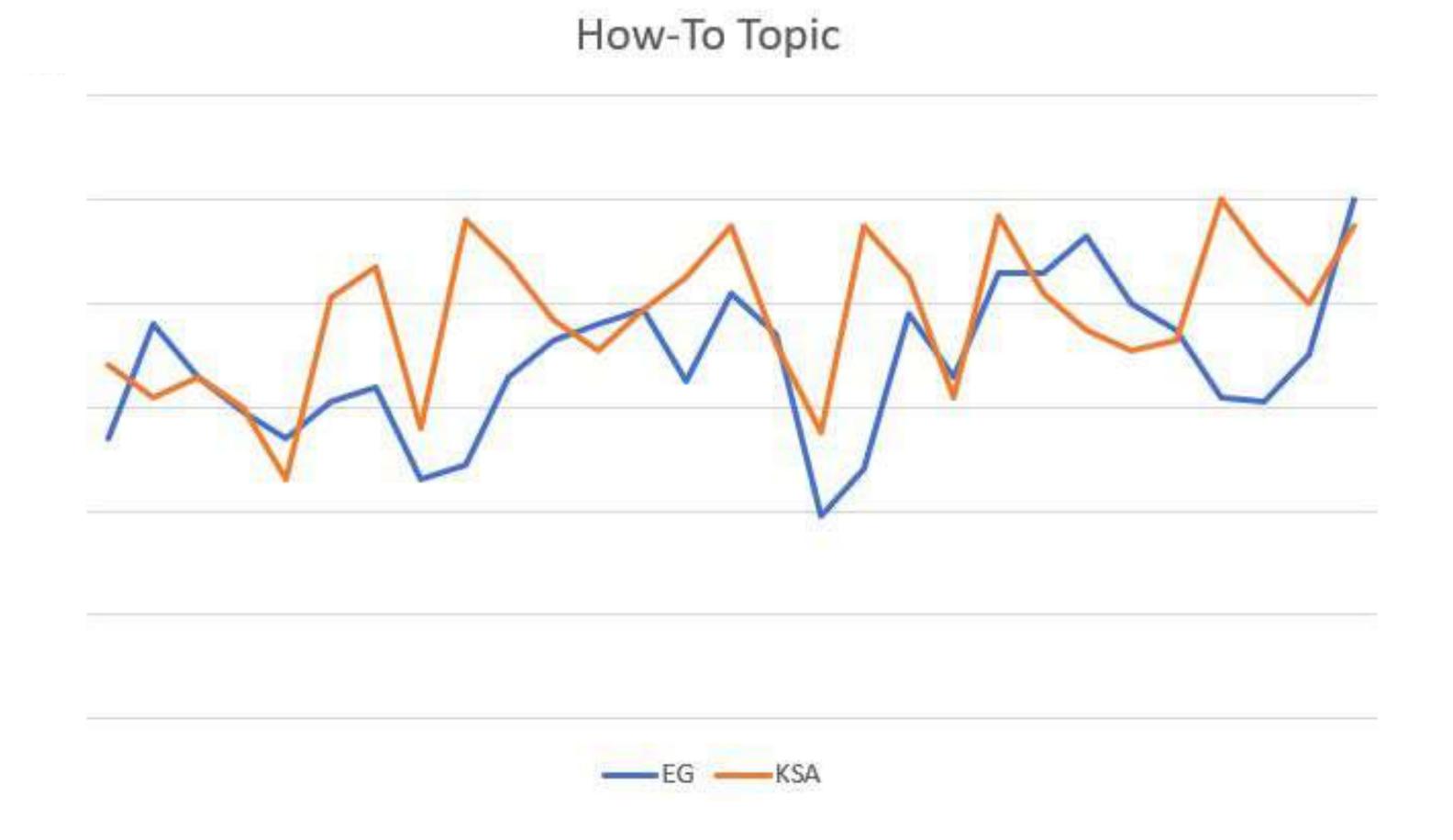




IT IS TIME TO DO IT YOURSELF!

30% GROWTH IN
"HOW-TO" SEARCHES ON
YOUTUBE IN KSA WHILE
GROWTH IN EGYPT WAS
71%.

Most people no longer have the luxury of relying on businesses and services as much as they used to, so they are now learning how to do everything themselves. This involves cooking, cleaning and all the basic chores in addition to indoor activities so that people can keep themselves entertained.



HOW TO WORK FROM HOME?

106%

MoM Growth in searches for office chairs, study table and workstations

31%

MoM Growth in searches for Computers and Accessories

MoM growths are during March



Working from Home: How to Plan Your Day Thomas Frank 1 day ago · 79K views



Working from HOME Routine + productivity tips
Meghan Livingsto...
20 hours ago · 7.5K v...



Working from home be like..

Trey Kennedy
6 days ago · 707K vie...



Working from
Home: How to
Set Up Your W...
Thomas Frank
3 days ago · 148K vie...



SNATCHERS
WORK FROM
HOME | Come...
The Idiotz
1 day ago · 214K views

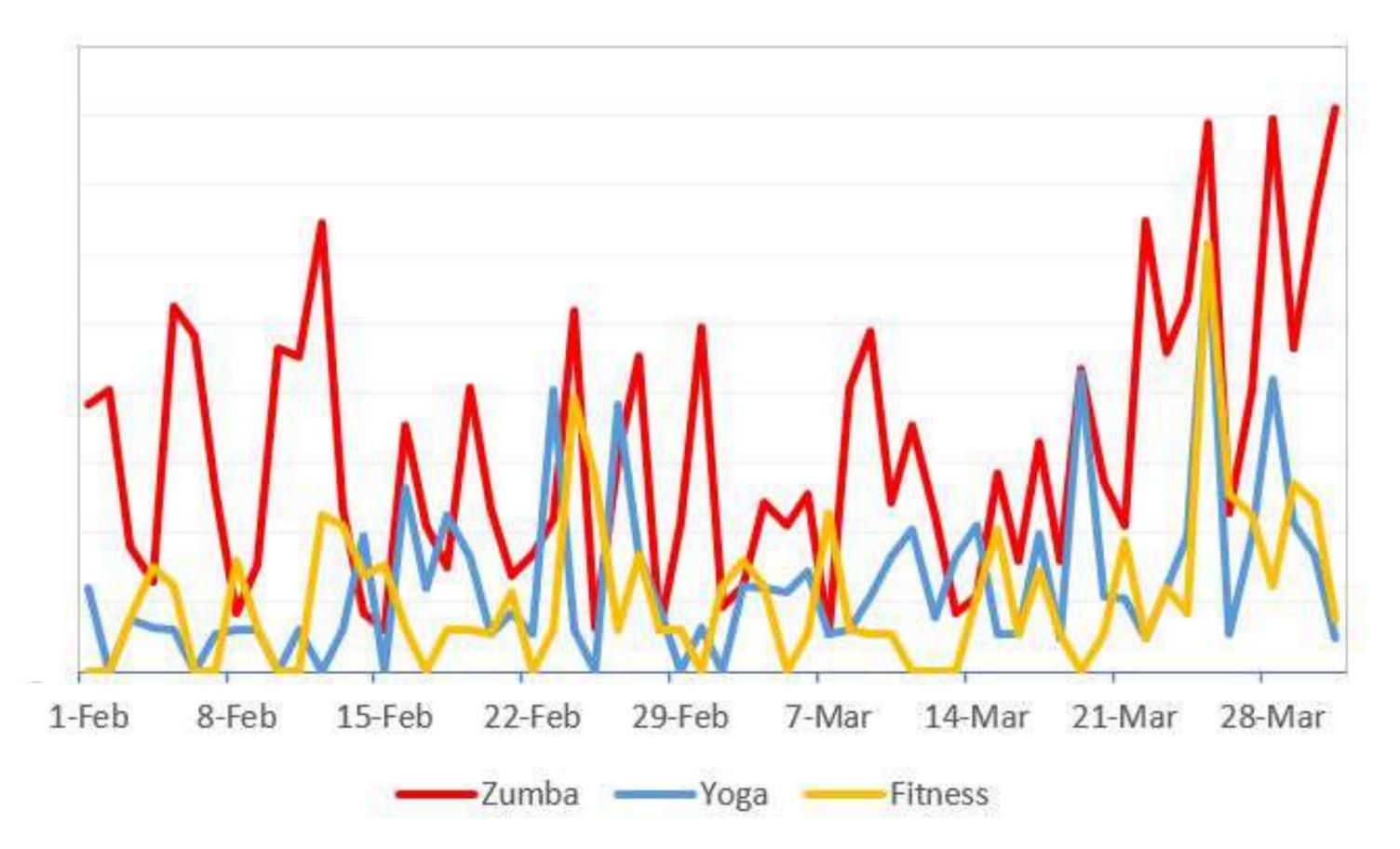


HOME WORKOUT AND MEDITATION ARE ON A RISE

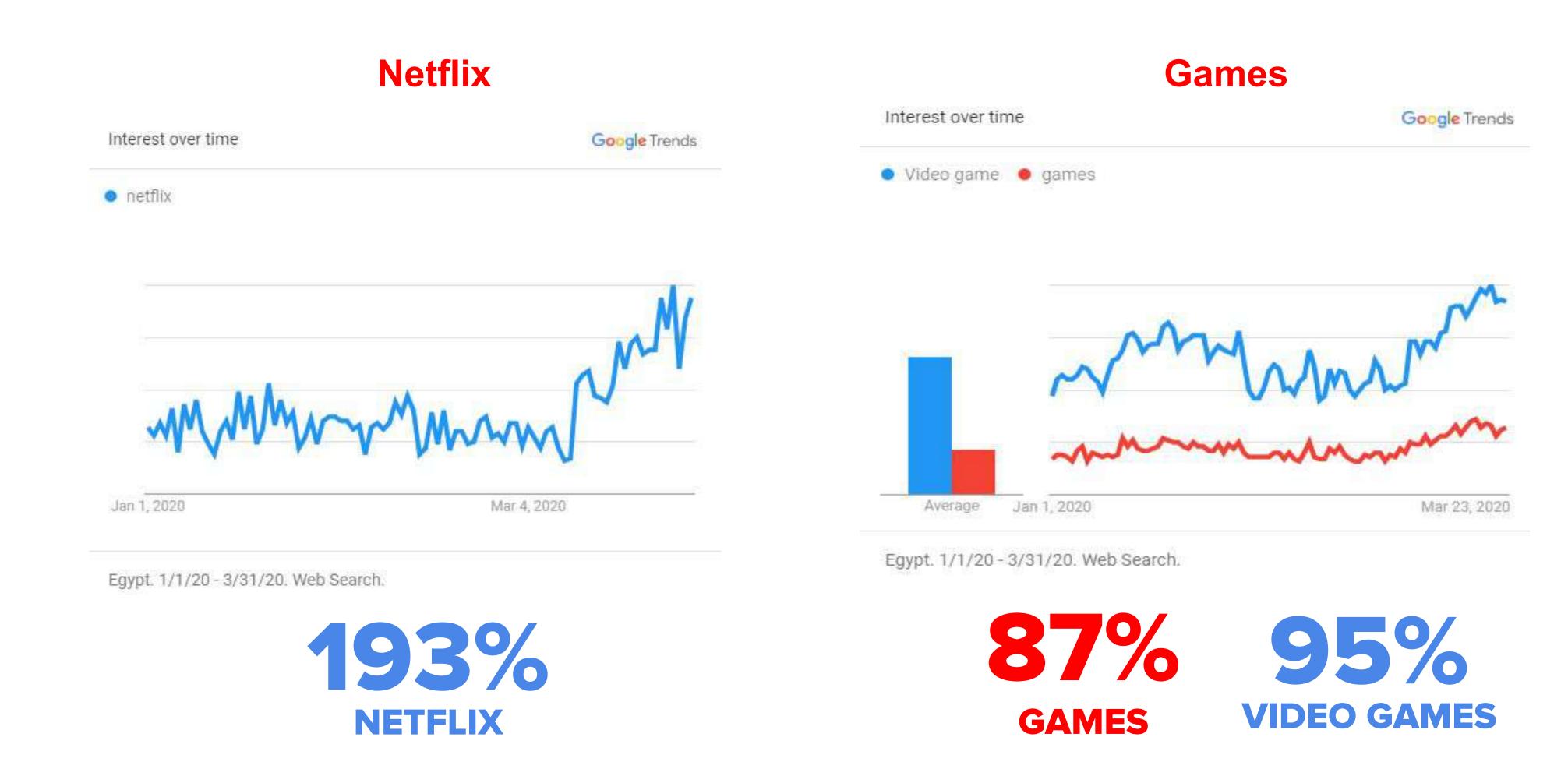
+35% ZUMBA

+55%
YOGA

+345%
FITNESS

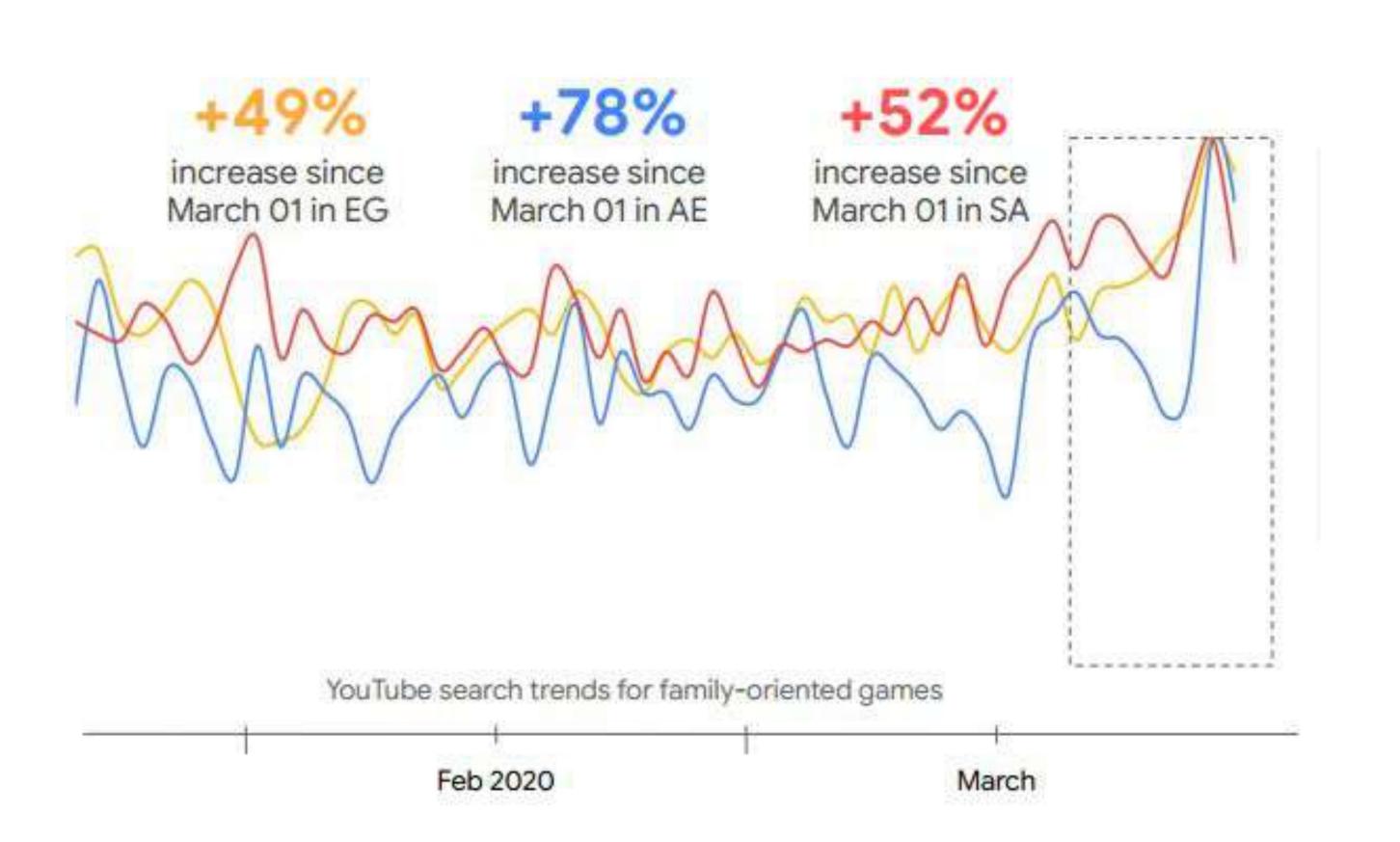


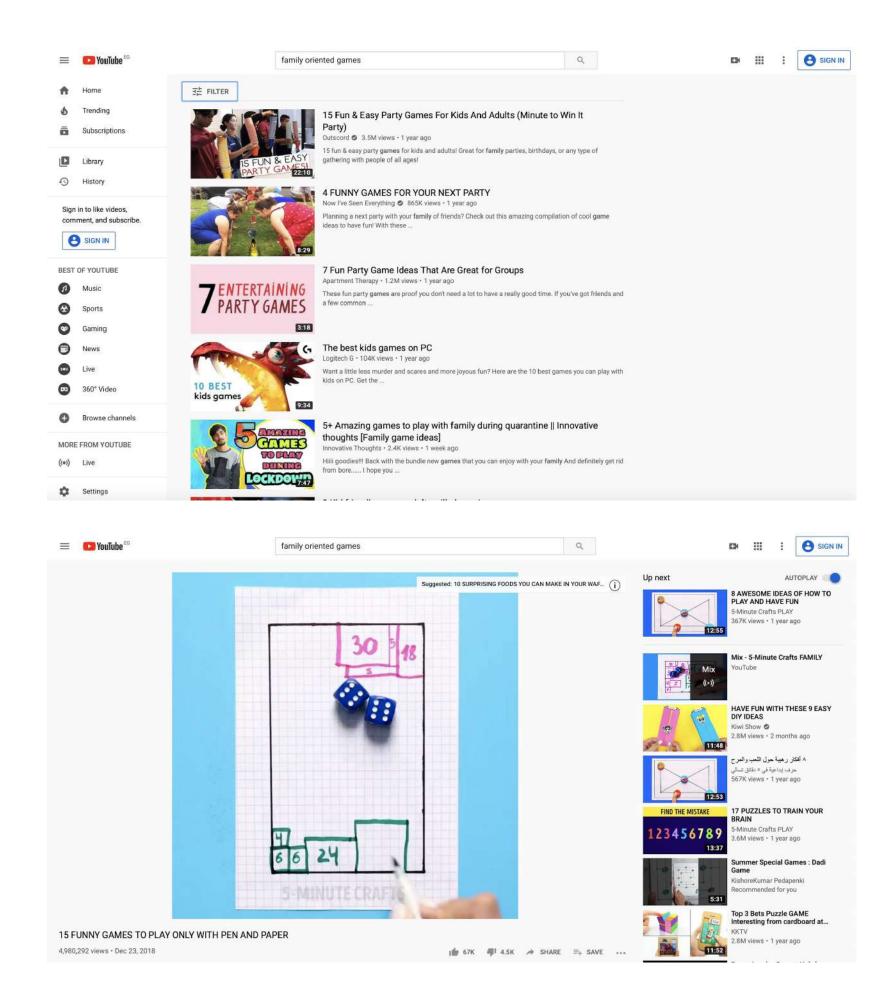
A BIG NEED FOR ENTERTAINMENT



LOOKING FOR FAMILY GAMES

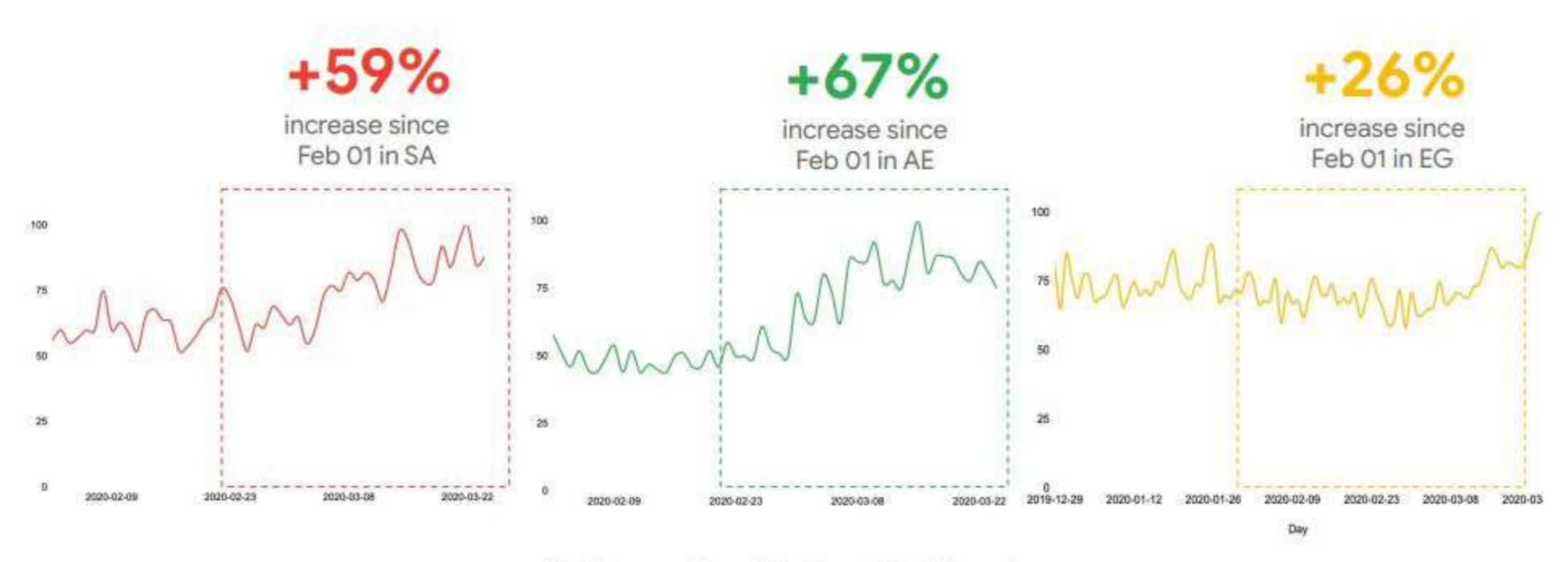
AS PARENTS TRY TO KEEP KIDS OCCUPIED





BECAUSE WE COULD ALL USE A GOOD LAUGH

Looking for humour on Youtube

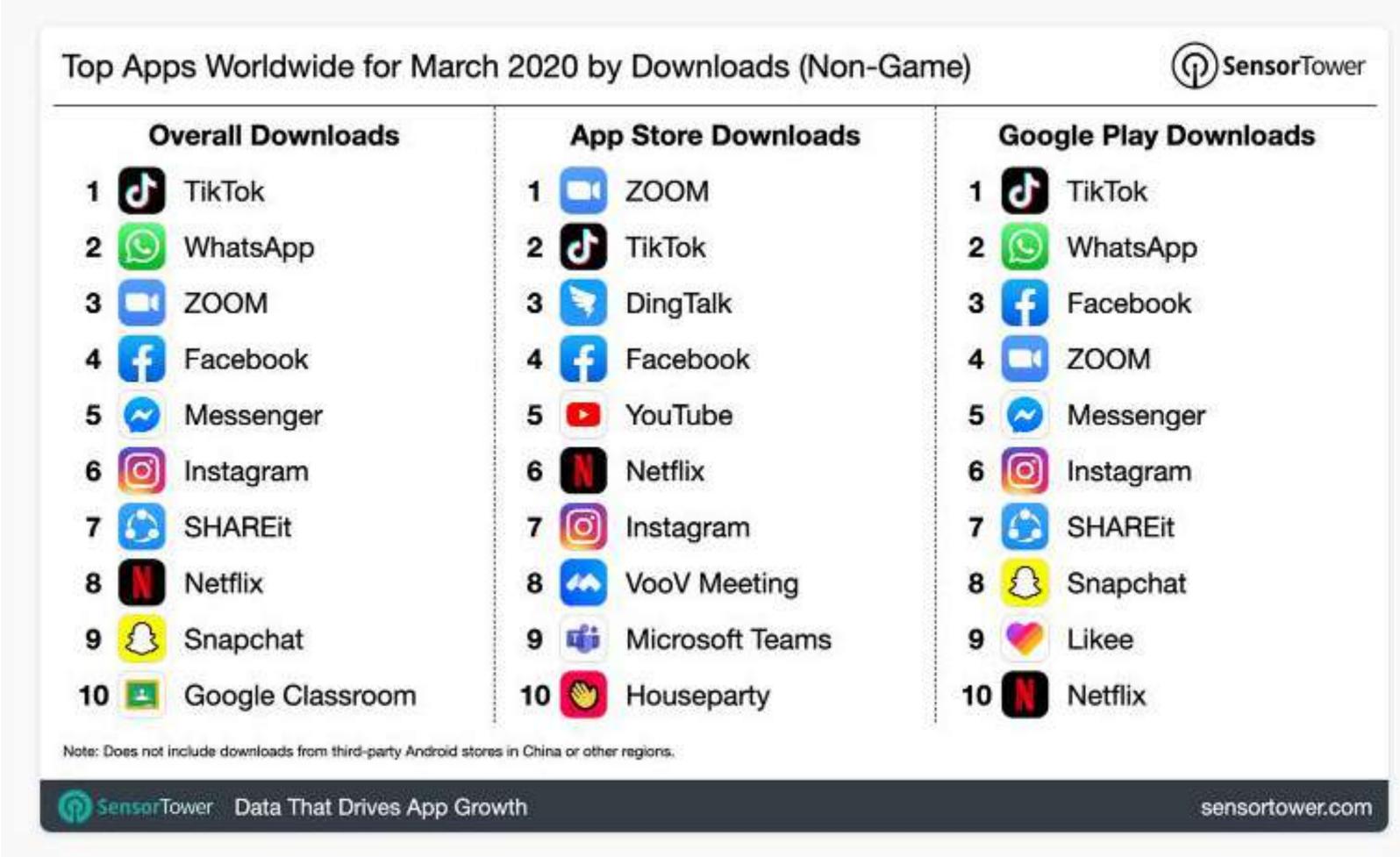


YouTube search trends for Humor Entertainment

IMPACT ON Platforms Consumption



TikTok was the most downloaded non-game app worldwide for March 2020 with more than 115.2M downloads, which represented a 98.4% increase from March 2019.





Source: SensorTower March Data

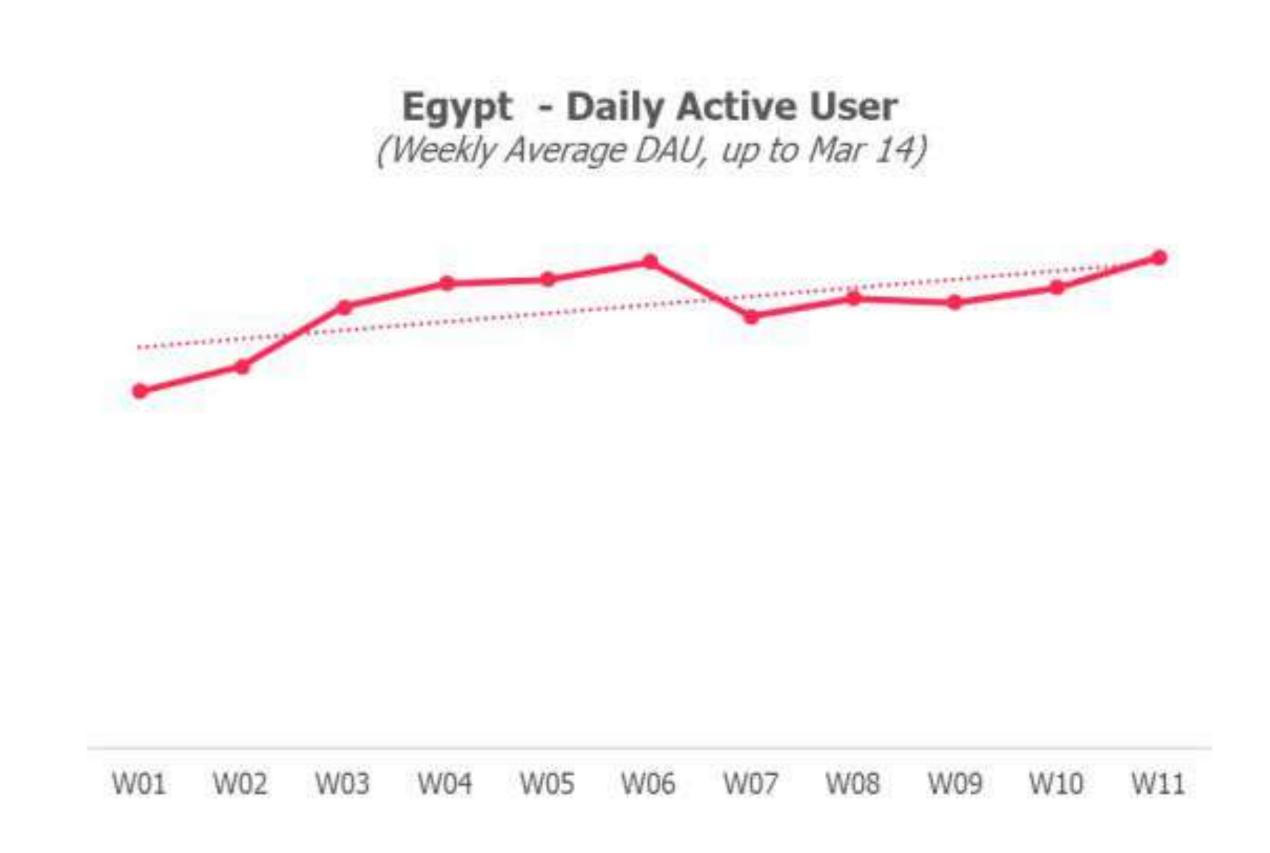


6 TIMES/DAY

Average sessions per user per day in Egypt has increased from 5 times/day (W1 2020) to 6 times/day (W11 2020)

42 MINS/DAY

Average times spent per user per day in Egypt has increased from 37 times/day (W1 2020) to 42 times/day (W11 2020)



Source: TikTok in Egypt - Platform Snapshot, April 2020

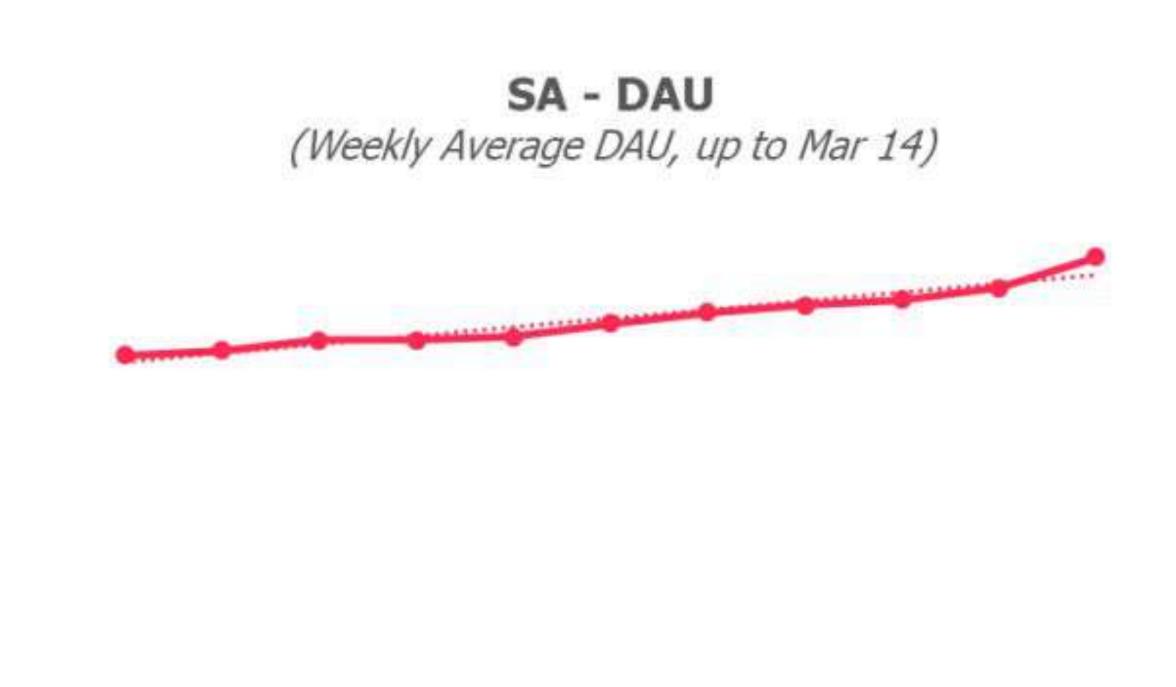


8 TIMES/DAY

Average sessions per user per day in GCC has increased from 7 times/day (W1 2020) to 8 times/day (W11 2020)

53 MINS/DAY

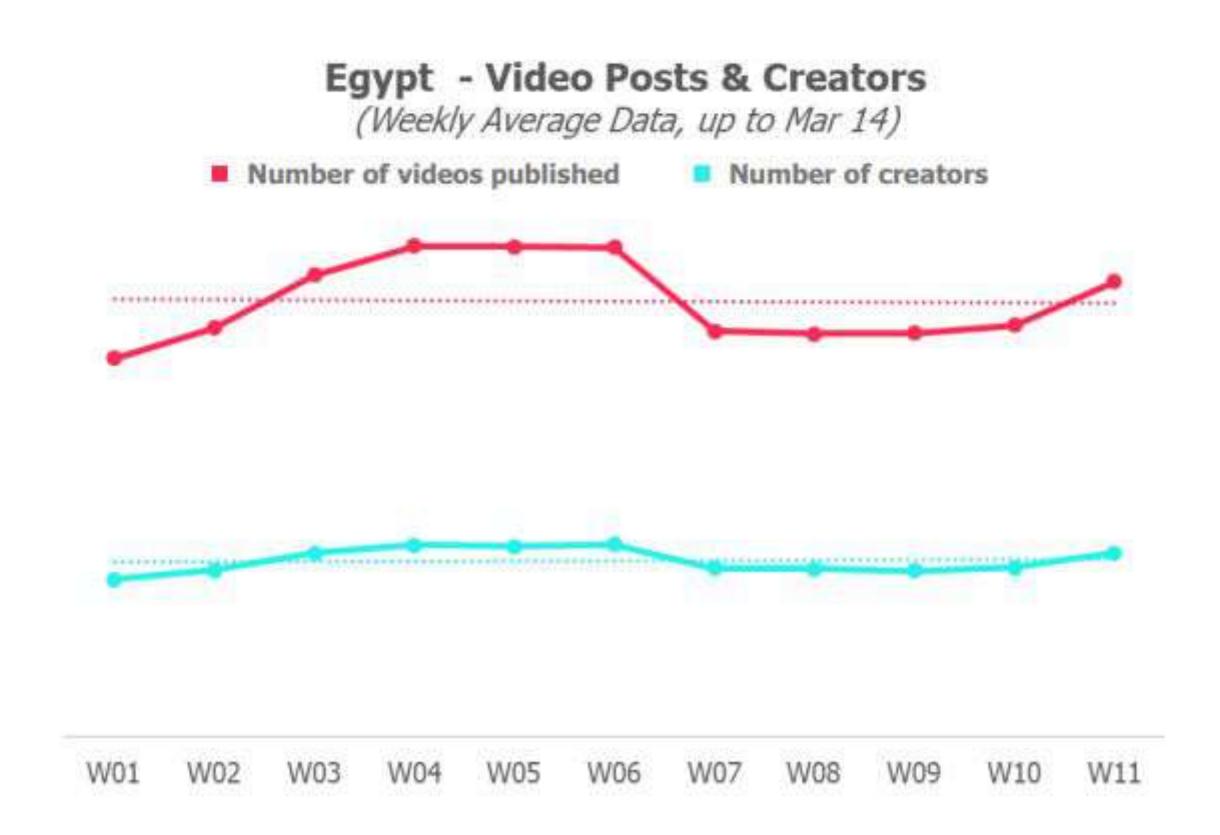
Average times spent per user per day in GCC has increased from 48 times/day (W1 2020) to 53 times/day (W11 2020)



Source: TikTok in GCC - Platform Snapshot, April 2020



Content creation has massively increased ever since the lockdown. There has also been an increase in the number of content creators due to the fact that fast and creative video-making (especially on platforms such as TikTok) has been trending.

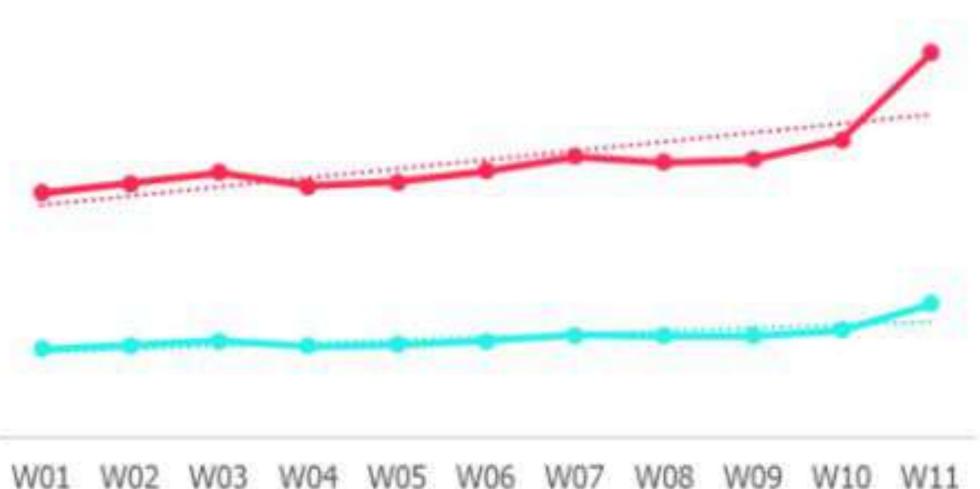


Source: TikTok in Egypt - Platform Snapshot, April 2020



Same goes for KSA, content creation has massively increased ever since the lockdown. There has also been an increase in the number of content creators due to the fact that fast and creative video-making (especially on platforms such as TikTok) has been trending.

SA Video Post & Creators (Weekly Average Data, up to Mar 14)



Source: TikTok in GCC- Platform Snapshot, April 2020



YOUTUBE CONSUMPTION IN MENA

News Videos and News Live-Streaming are among the top watched content in the MENA Region

- Daily active users are growing fast: 10% increase since Feb 13
- Average daily watchtime has increased with 5% since Feb 13
- Views have increased: about 15% since Feb 13







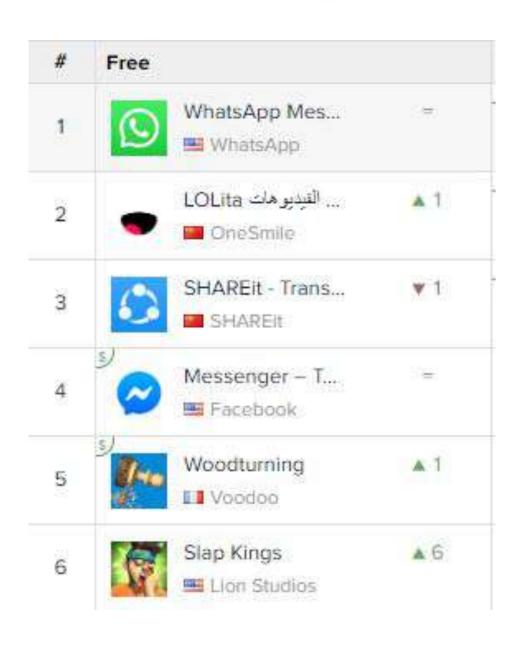






TOP APPS | EGYPT | WHAT CHANGED?







1st March

31st March

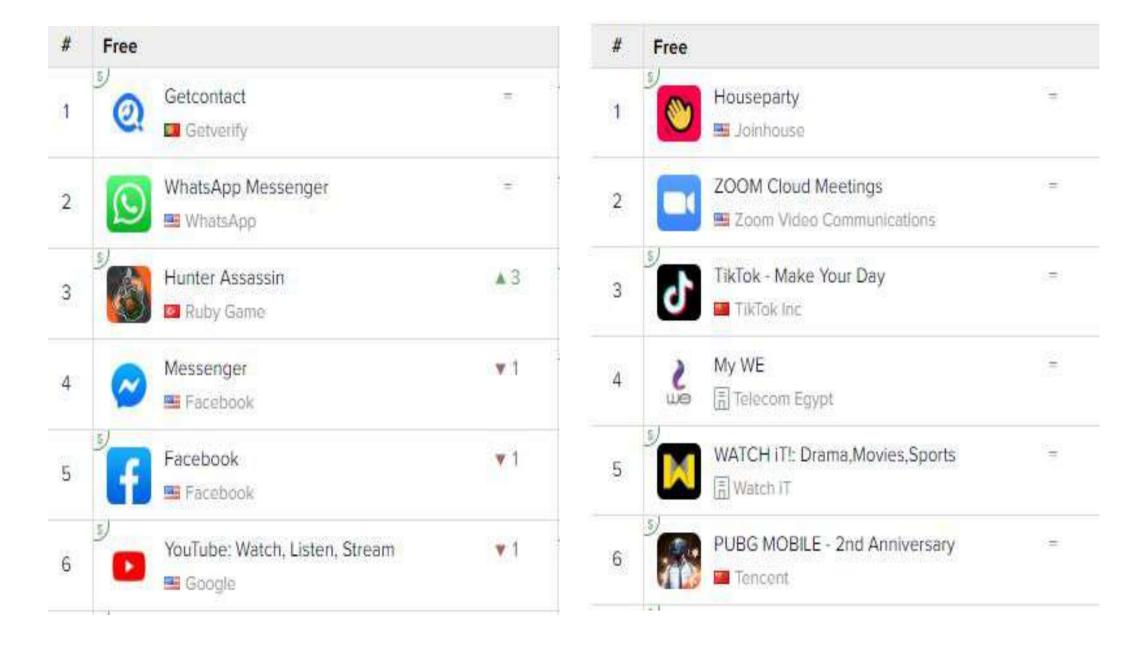
Top ranked apps change throughout the month of March. TikTok has been massively trending during COVID-19 and by the end of March it was the #1 ranked app. WhatsApp remains in the top three as people consider this platform as a main communication tool and, with university and school closure, student learning apps grow and we see Noon Academy ranked as the 3rd app. Top games were replaced with video conferencing, messaging and video platforms during March.

Source: App Annie Top App Charts March 2020



TOP APPS | EGYPT | WHAT CHANGED?





1st March

31st March

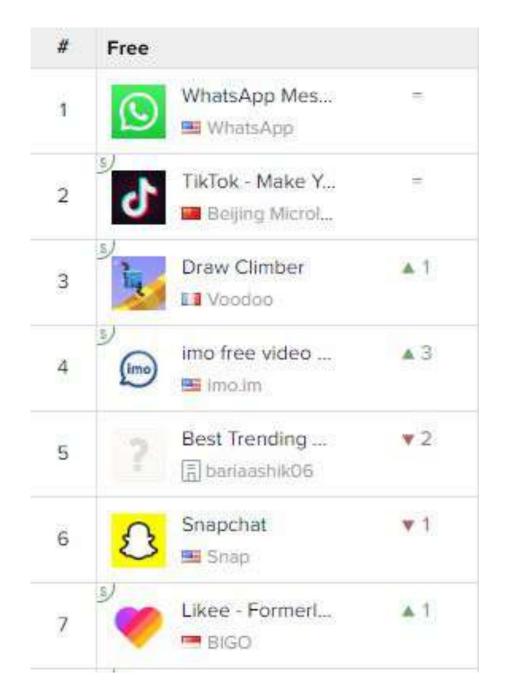
Top three ranked apps changed to Houseparty, ZOOM and TikTok and it just confirms that more people have been replacing physical interactions with virtual interactions on video conferencing and video sharing apps. My WE was also trending now that people were managing their mobile and home Internet online. Online streaming platforms such as Watch It continue to grow and more people are now using PUBG to keep themselves entertained.

Source: App Annie Top App Charts March 2020



TRENDING APPS | KSA | WHAT CHANGED?





1st March

31st March

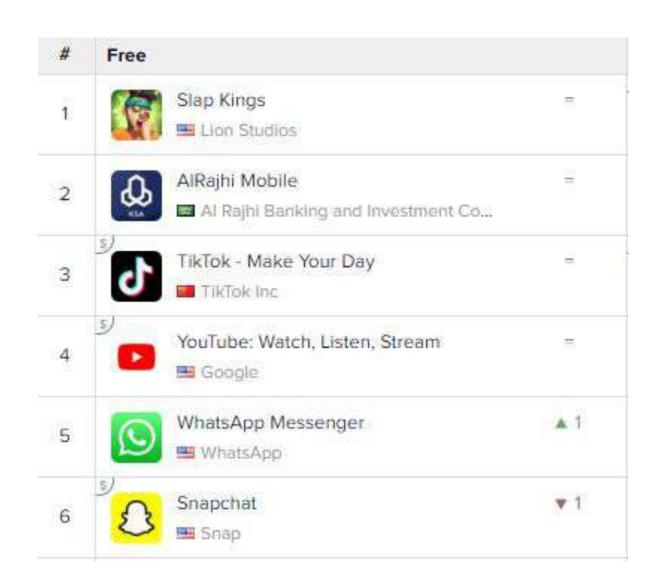
In Saudi Arabia, we see a change throughout the month of March as well. There is an overall increase in interest in games & Perfect Cream game seems to be the most ranking app by the end of March replacing WhatsApp. TikTok holds its place and we see more higher ranking for video and video conferencing apps.

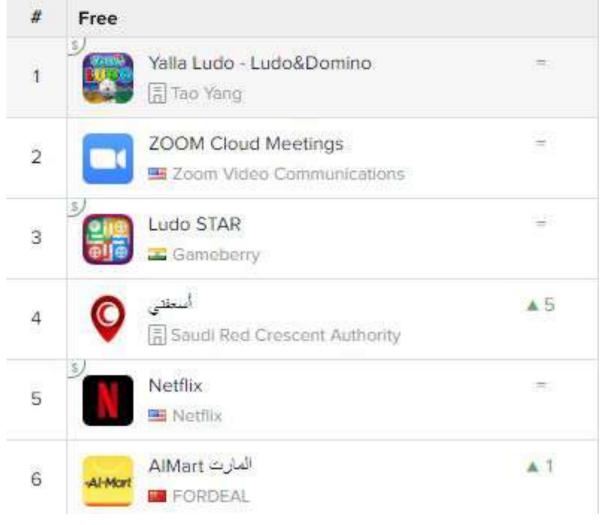
Source: App Annie Top App Charts March 2020



TRENDING APPS | KSA | WHAT CHANGED?







The top ranking app has changed from the Slap Kings game to Yalla Ludo; Ludo&Domino online game and chat. So we can conclude from that that peoples' interest grew in more social games that included multiple players and chatting. ZOOM and Ludo Star game was also highly ranked. ما السعفني app (powered by the Saudi Red Crescent Authority) was also growing as more people needed online medical support and permits during the outbreak. Same goes for Netflix and the online electronic store AlMart very frequently.

1st March 31st March

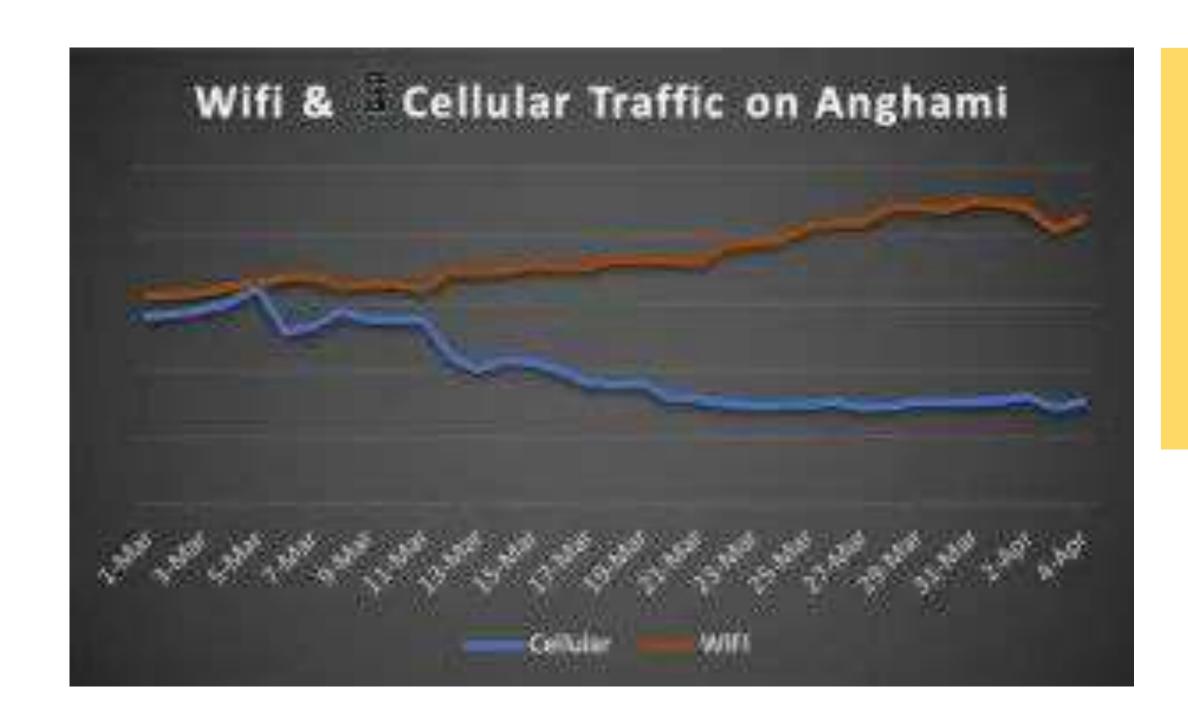
Source: App Annie Top App Charts March 2020



WHAT ABOUT MUSIC?

"While music streaming dropped 10 to 15% over the initial first couple of weeks, it's indicative that many are adapting to COVID19 and creating a new way of consumption."

-Elie Habib, CEO and Founder of Anghami



Anghami App usage in **TVs** saw a

30%

growth

The percentage of people listening to music while walking has dropped from 45% to 25% as more people work out at home instead of jogging outside. We also see a 30% increase in Anghami App usage on TV so it's definitely reassuring to see people's devotion to #StayHome



Source: Anghami Talks - April 2020



MUSIC STREAMING IS CHANGING

"Podcasts are a great way to learn more about a topic, enjoy world-class entertainment or simply relax and unwind. We want to help people make the most out of the current situation. One way of doing that is by helping them discover podcasts they'll love. Our 'Shows' tab opens up a whole new world of things to listen to. It's the perfect companion to our 'Stay at home' channel."

-Tarek Mounir, CEO MENA & TURKEY, Deezer Source

PEAK TIME DURING THE WEEK



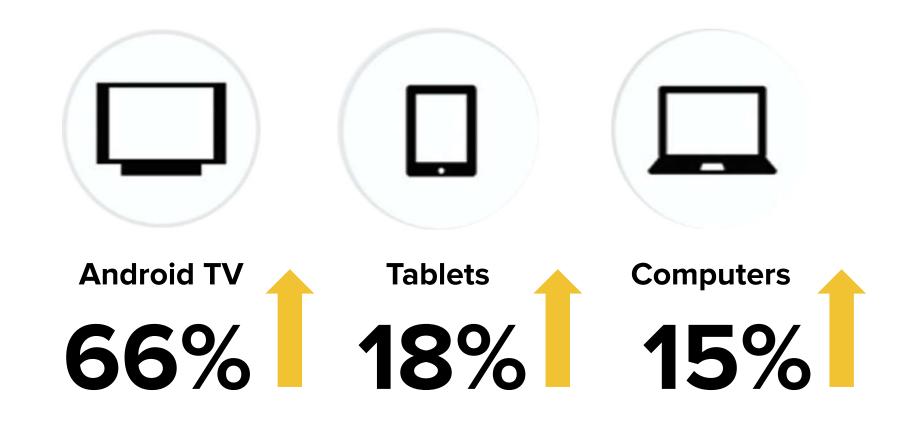
Shift in the average of "podcasts" usage during weekdays to start from

11AM or **12PM**

compared to the usual 8AM or 9AM

CHANGE IN THE DEVICES USED

Music listeners are now using household tech appliances to stream their favorite music









INTERNET CONSUMPTION INCREASED

In the second week of April in comparison to the 2nd week of March:



Mobile Internet

18%



Home Internet

87%



(International) (Local)

376%

Increase of learning websites

133%

Increase of people surfing the Internet

Peak time doubled to

15hrs daily from 12PM-3PM





INTERNET CONSUMPTION INCREASED

The percentage increase in usage of different applications:



194%



151%



96%



Netflix 69%



Instagram

59%



Youtube

41%



Shahid.com

40%



WhatsApp

34%





INTERNET CONSUMPTION INCREASED

Educational platform users grew by

1000%

Remote job demand growth for different sectors increased by

1128%

The demand for gaming platforms increased by

256%

Increased use of health platforms

177%

The usage of social media applications increased by

73%

Increased use of education and health applications by

70%

SiC

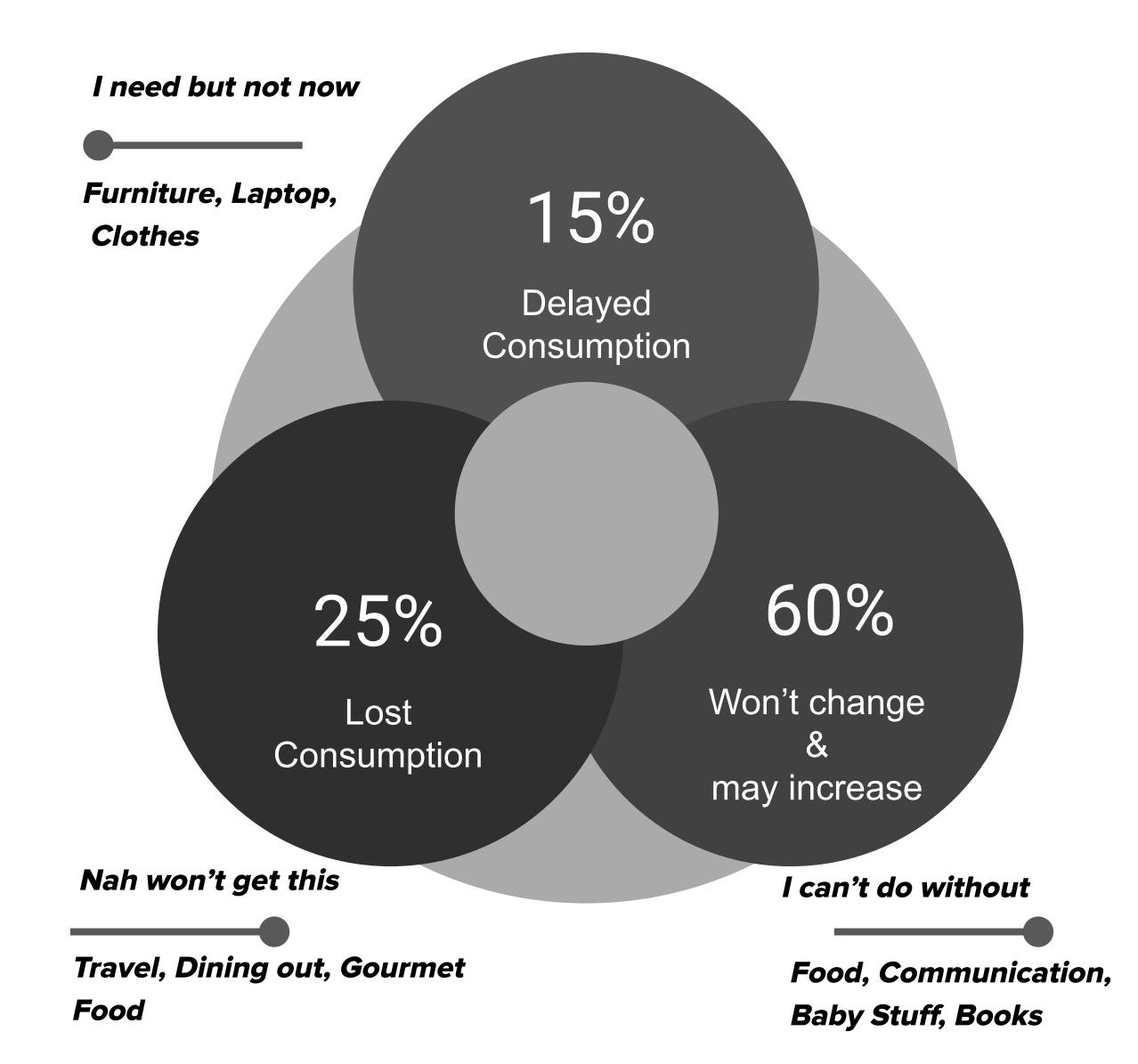
MPACTON Spending Behavior



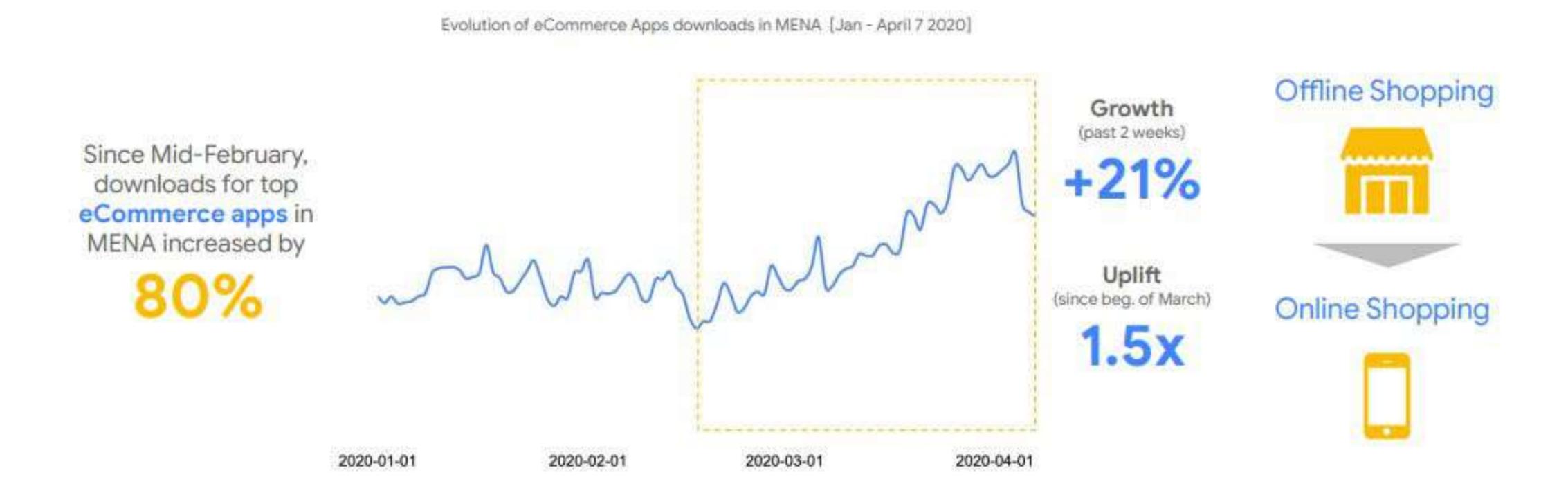
EXPECTED SPENDING DURING LOCKDOWN

The spending forecast is broken down to three different categories:

- 1- An estimate of 60% of consumer spending will remain unchanged and may even increase. This is amount is for anything paid for by direct debit and the necessities. The spending for home insurance for instance, will not go down. Spending on grocery shopping will increase. These industries won't be hit by the pandemic.
- 2- Another 15% is considered delayed spending. Which is basically anything people will put off until the lockdown is over. A good example would be new furniture. The outbreak won't stop people from buying something they want but it will delay the purchase until after the lockdown.
- 3- The final 25% is lost spending. Which is the amount consumers will save by not going out daily and spending as much on things such as eating out, daily transportation etc.

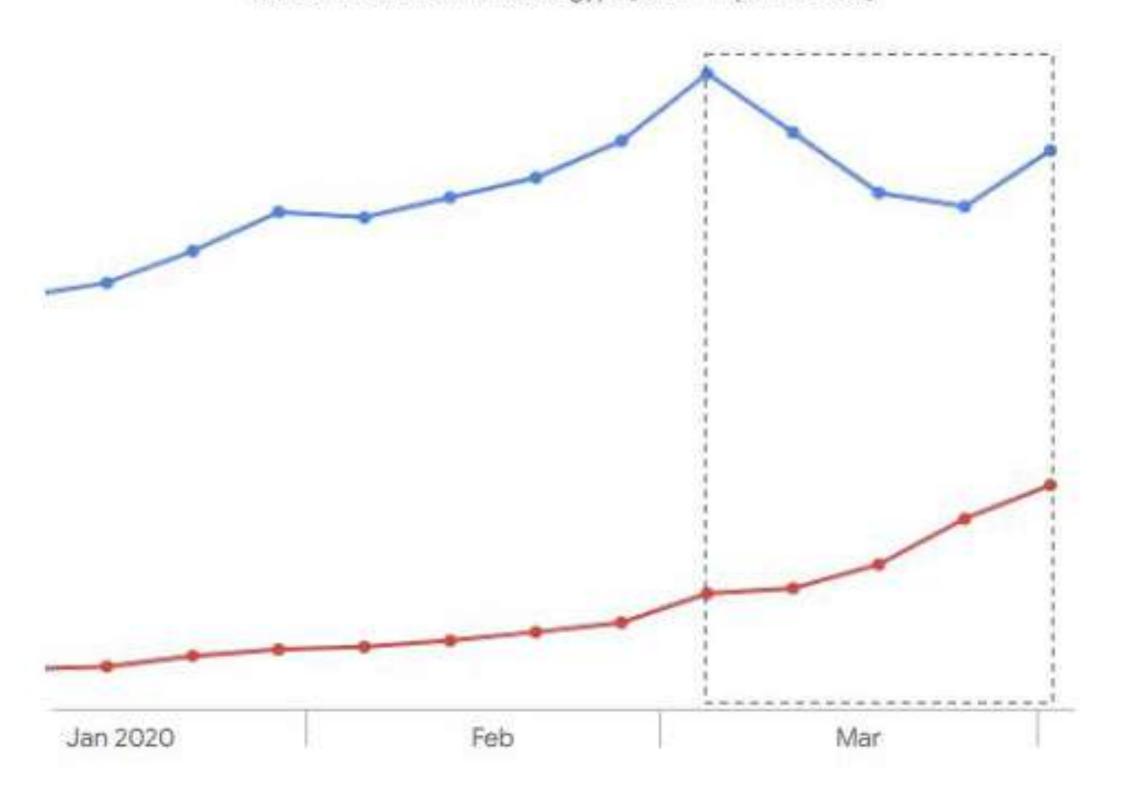


ONLINE SHOPPING IS ACCELERATING



PURCHASES SHIFTED FROM DISCRETIONARY GOODS TO ESSENTIALS





Discretionary includes Clothing, Make-up, Perfumes, Home Decor, etc.

Essential includes Household Supplies, Food & Beverages, Home Appliances, etc.

ONLINE GROCERY SHOPPING WENT UP

In the 3rd week of March, downloads for grocery delivery apps witness its highest peak, with a

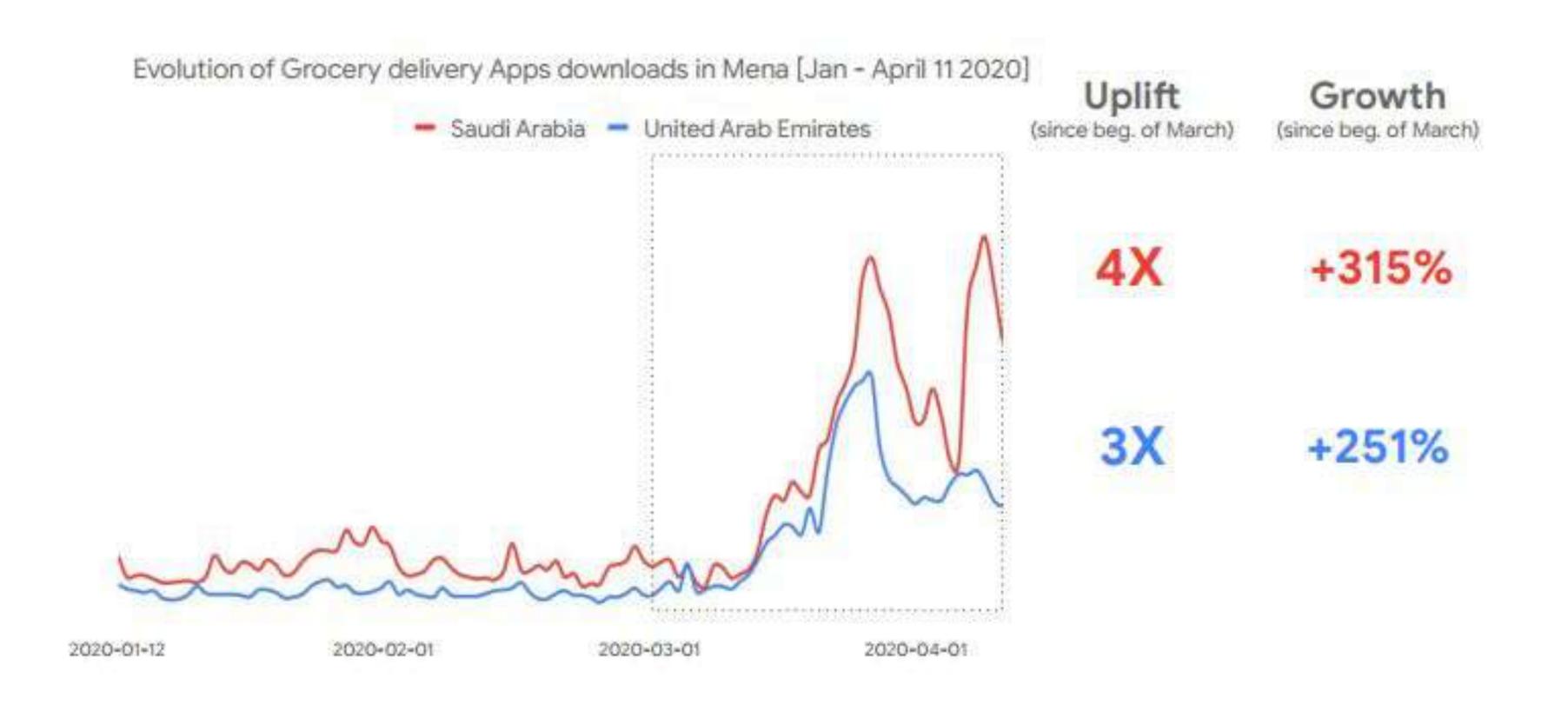
+86%

WoW increase overall

Since April 01, downloads for grocery delivery apps witness a

+23%

increase overall across AE & SA



Shift in Content

PEOPLE Around the World

TRENDING EMOJIS













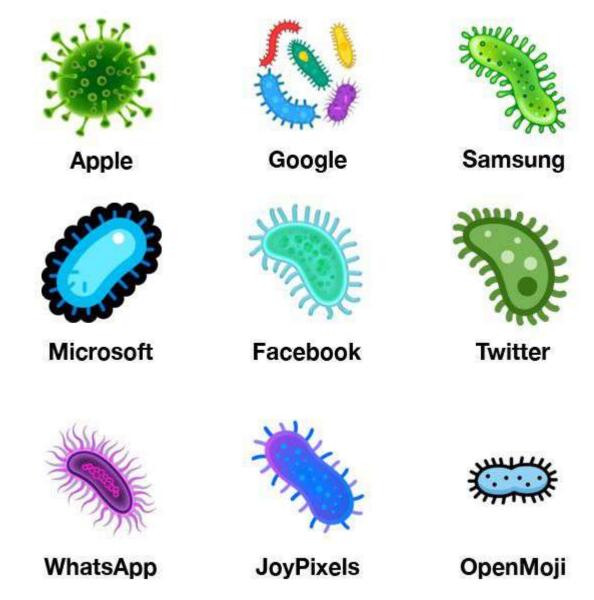






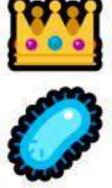






Different #Coronavirus Emoji Versions

TRENDING EMOJIS



- ♠↔♠ Keep a reasonable distance from others
- 🖟 🗝 🦣 Stand 2m (6ft) apart
- 🖟 🟦 Stay at home
- No handshakes
- No close contact
- No large gatherings

- O Don't touch your face
- 🚫 🤗 🕮 Don't sneeze into hands
- 🔽 🕾 💪 Do sneeze into your elbow
 - Wash your hands regularly, for at least 20 seconds
- Mave groceries and other items delivered to your home

EDUCATIONAL CONTENT ABOUT COVID-19















737K views • 1 week ago





ليه العالم خايف من كورونا ؟ | الدوال الأسية Sharafestien • شرفشتاين - 390K views • 2 weeks ago



فار ماستان - وباء كور ونا العالمي Pharmastan - فار ماستان • عاد ماستان - 146K views • 4 days ago



حرب الكورونا - ايجيكولوجي © ايجيكولوجي - Egychology 592K views • 1 week ago

CONTENT ABOUT THE LOCKDOWN

46,431 views • Apr 2, 2020

141,212 views + Apr 2, 2020







نصائح ذكية ستيغر حياتك لتقليل الملل في الحجر المنزلي Nina Sbeiti • 9.3K views • 1 day ago . سوال القديو: شو اول خطوه رح علشو شها؟ انشاءته بكون عجبكن القيديو و ما تنسو تشترك

إ روتيدي في الحجر المنزلي Rozzah ❷ 899K views • 1 week ago .https://bit.ly/2QW55tQ عجيد هون ؟ اشتر الله بالقناه https://www.instagram.co...



1 127K 4 3.1K → SHARE =+ SAVE ...



19K 4 527 → SHARE = SAVE ...

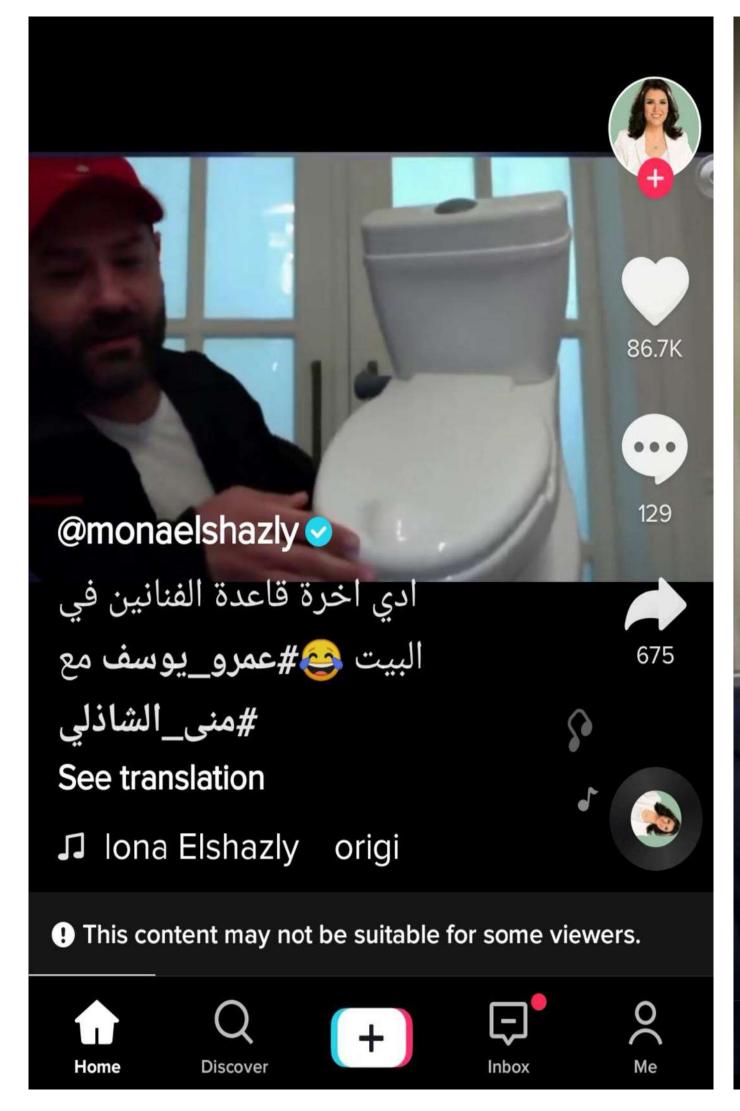


🥌 🛅 ارونين اليومي في الحجر المنزلي R.S Twins • 30K views • 2 days ago . دا کتیر وحبیدا تحمله لیکم زی ماطلبتو ۱۱ 🤝 💖 فیدیو روتین بتحمل ای فی



!!! (نهاية حجرة ورقة ومقص (الحجر المنزلي Hanan & Hussein حدان رحسين 630K views • 6 http : شكر الله على المشاهده شاهد المزيد من القيديو هات من هنا

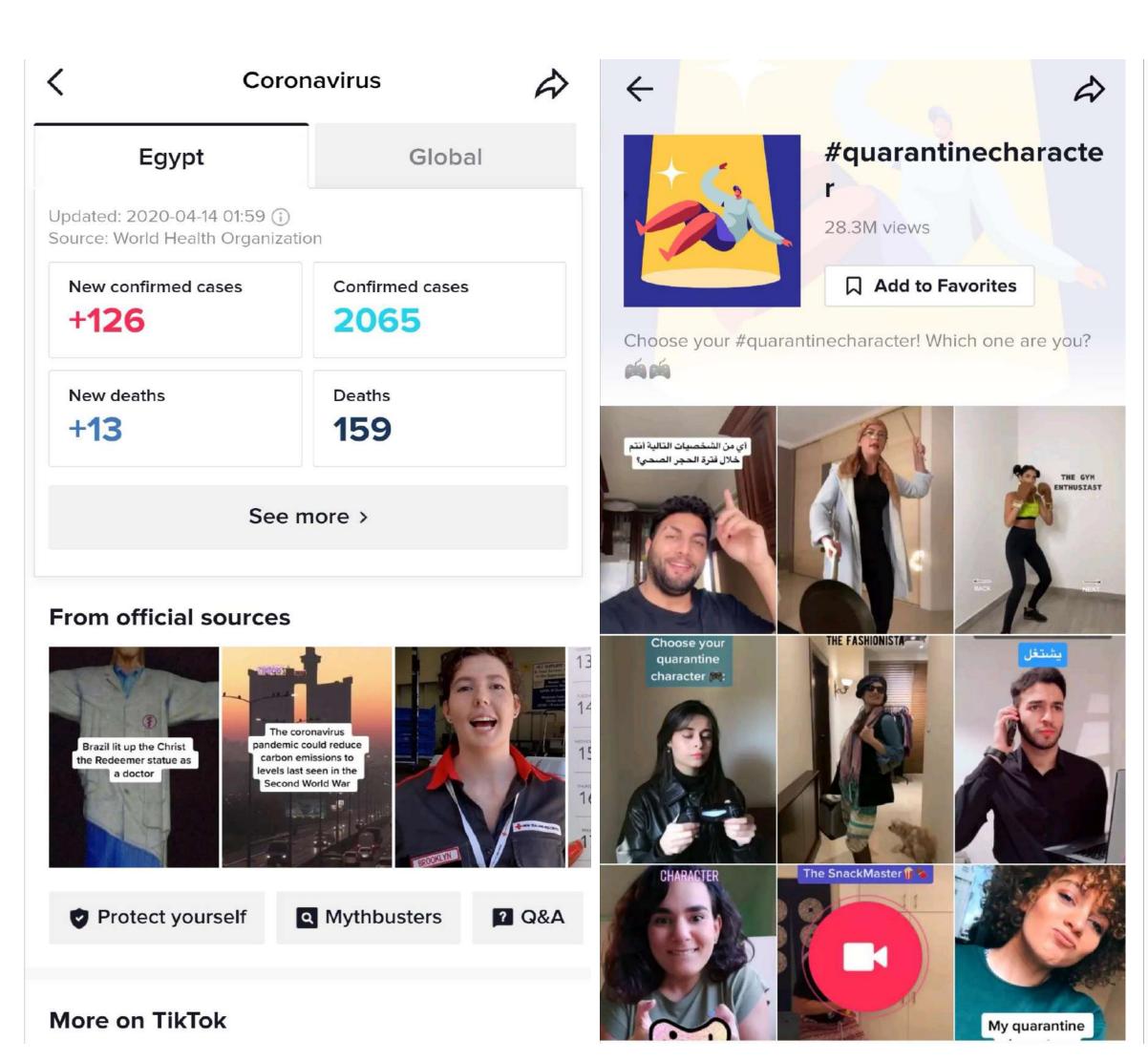
CONTENT ABOUT THE LOCKDOWN

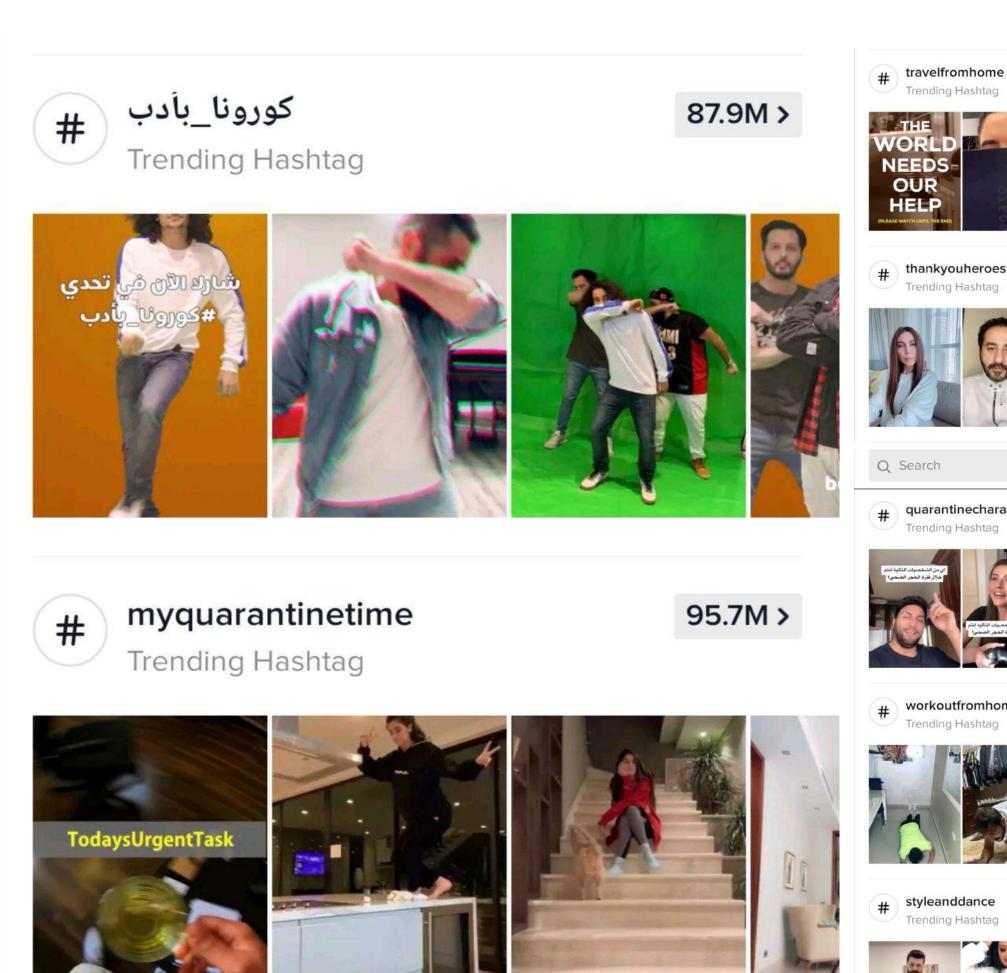






TRENDING COVID-19 HASHTAGS CHALLENGES





30.1M >

101.2M >

28.3M >

22.1M >

thankyouheroes

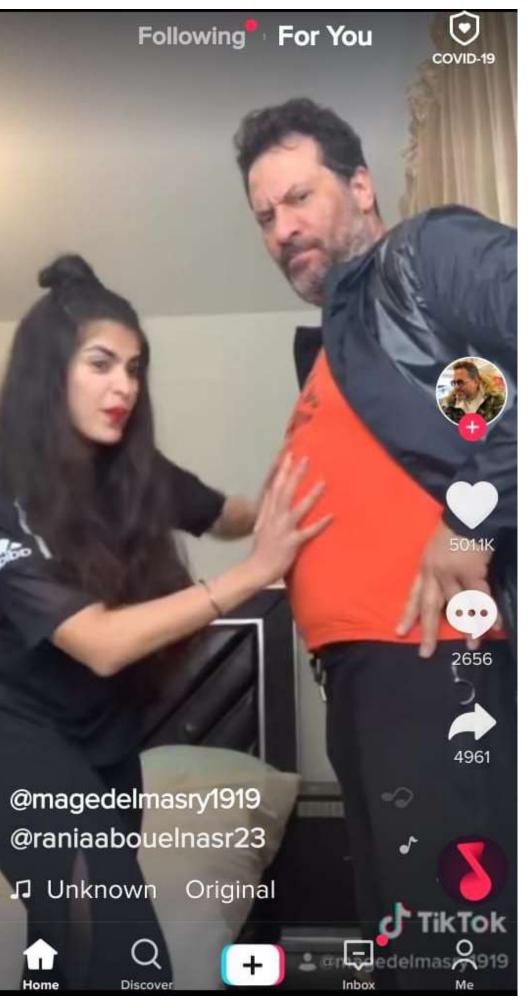
quarantinecharacter

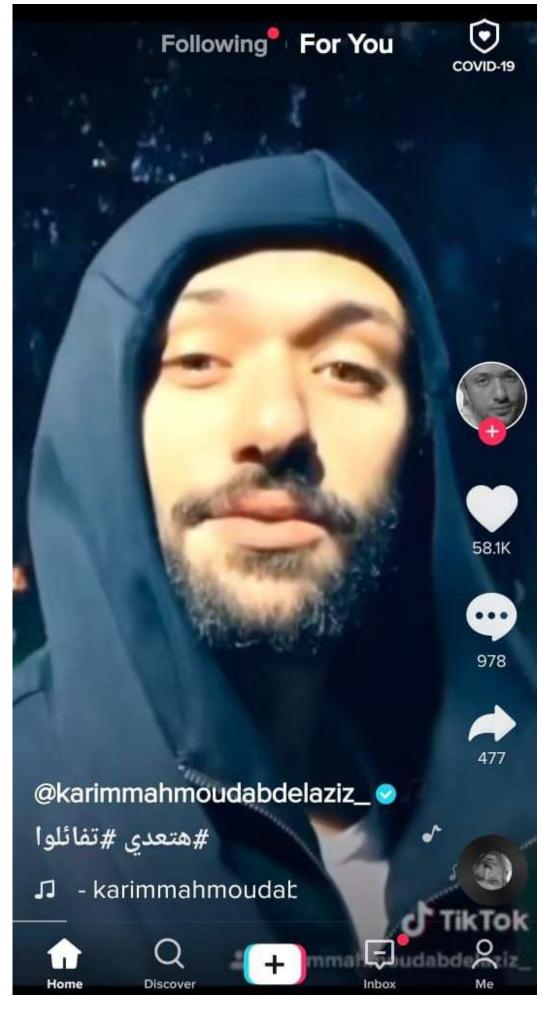
workoutfromhome

styleanddance

CELEBS JOINING THE TREND









WHAT DID Brands do?

FIRST... HOW DO CONSUMERS PERCEIVE ADS?

According to a study conducted to gain a better understanding on how people are responding to ads:

6%

said they don't think it's appropriate for brands to be advertising at the moment

64%

thought it was OK for brands to advertise

19%

believe that it's only OK for very specific brands to advertise

THEY WANT BRANDS TO TALK ABOUT...

77%
Out how the bran

'Talk about how the brand is helpful in the new everyday life'

75%

'Inform about their efforts to face the situation'

70%

'Offer a reassuring tone'

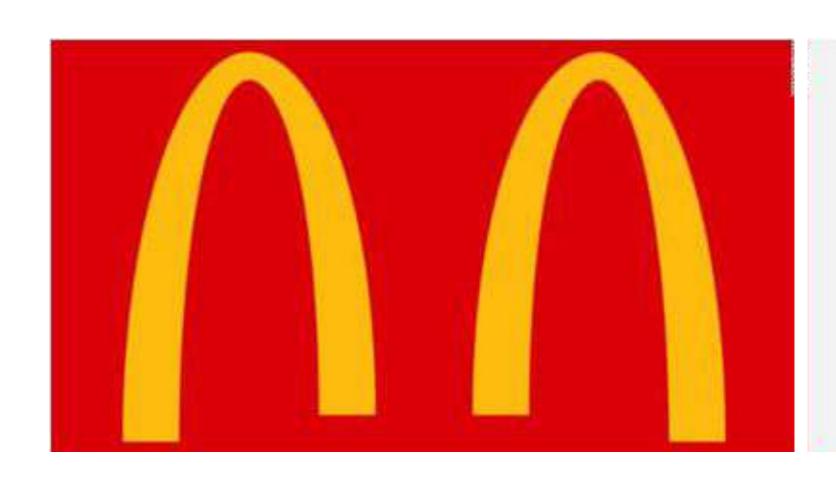
75%

said brands 'Should not exploit coronavirus situation to promote the brand'

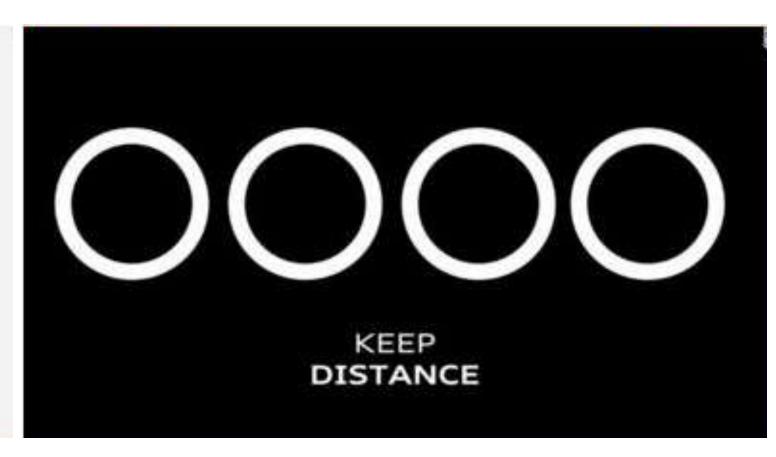
40%

said they 'Should avoid humorous tones'

ENCOURAGING SOCIAL DISTANCING







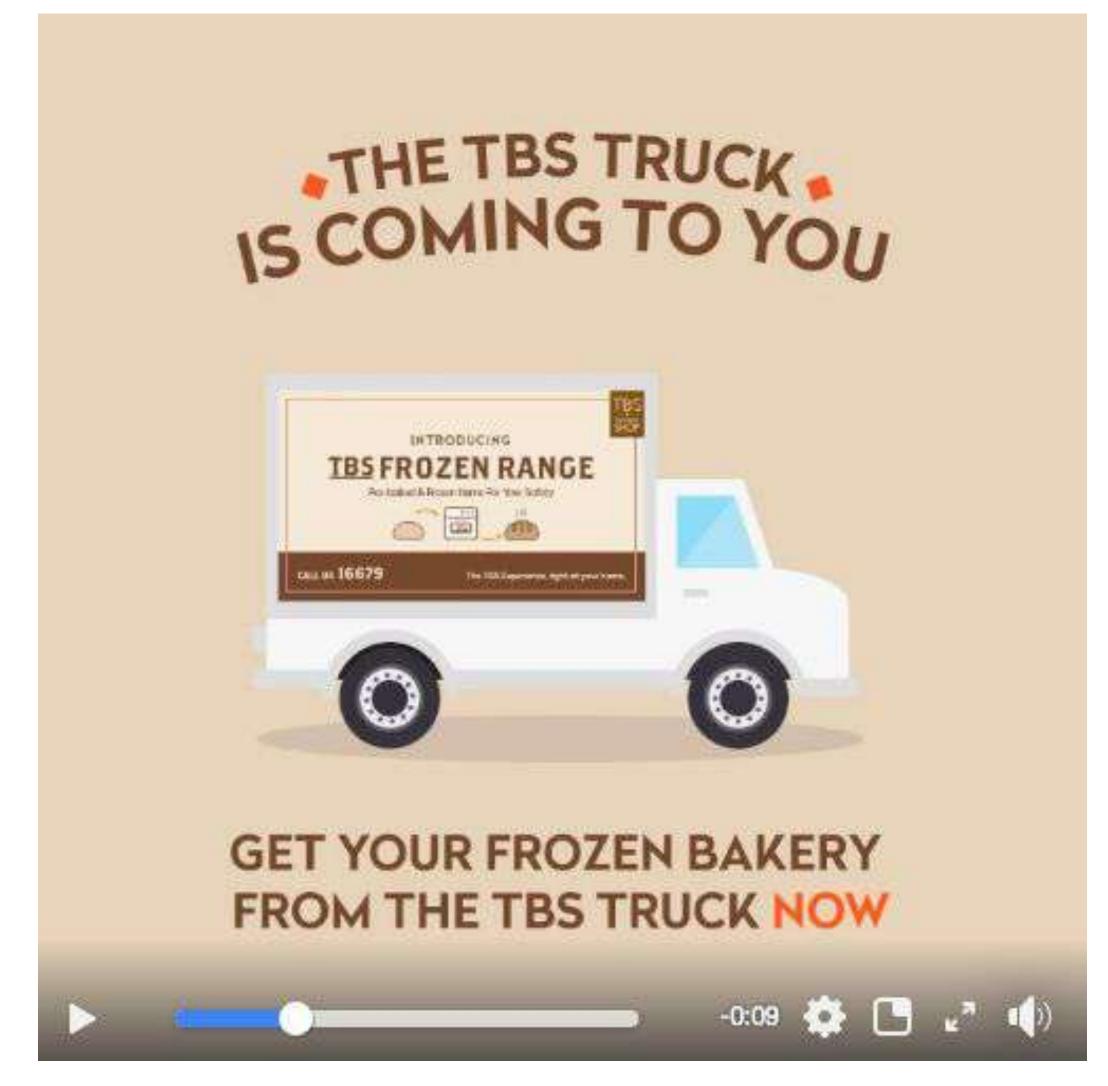






OFFERING NEW WAYS TO SUPPORT CONSUMERS





JOINING THE DONATION CHALLENGES







Charity Content: Some brands participated in charity initiatives supporting the families who got affected from the lockdown.

CHERING FOR THE FRONTLINERS

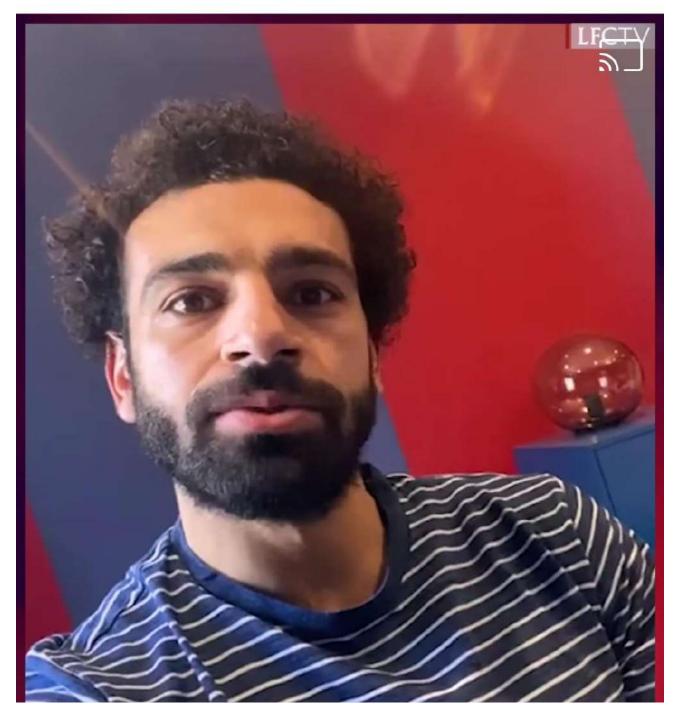


https://www.facebook.com/AlhokairFashion/videos/2652143735071081/



إلى جميع العاملين بالمجال الطبي في العالم، أبطال #يوم_الصحة_العالمي...

لدينا رسالة لكم من ليفربول 🧡



https://www.facebook.com/ArabicLFC/videos/620041968574646/

TURNING COMPETITION INTO COLLABORATION

Saudi_Airlines · Mar 26 @ السعودية | Saudi_Airlines · Mar 26 @ السعودية | SAUDIA @ ما جيلة المُشتَّاق إن ظال النّوى وتُقَطَّعَت سُبل الوصالِ... أجيبُوا؟

رفاق الدرب في الرياض flynas@ .. أجيبونا؟

#سحابة_وتعدي #الزم_بيتك<mark> @</mark> #الخطوط_السعودية





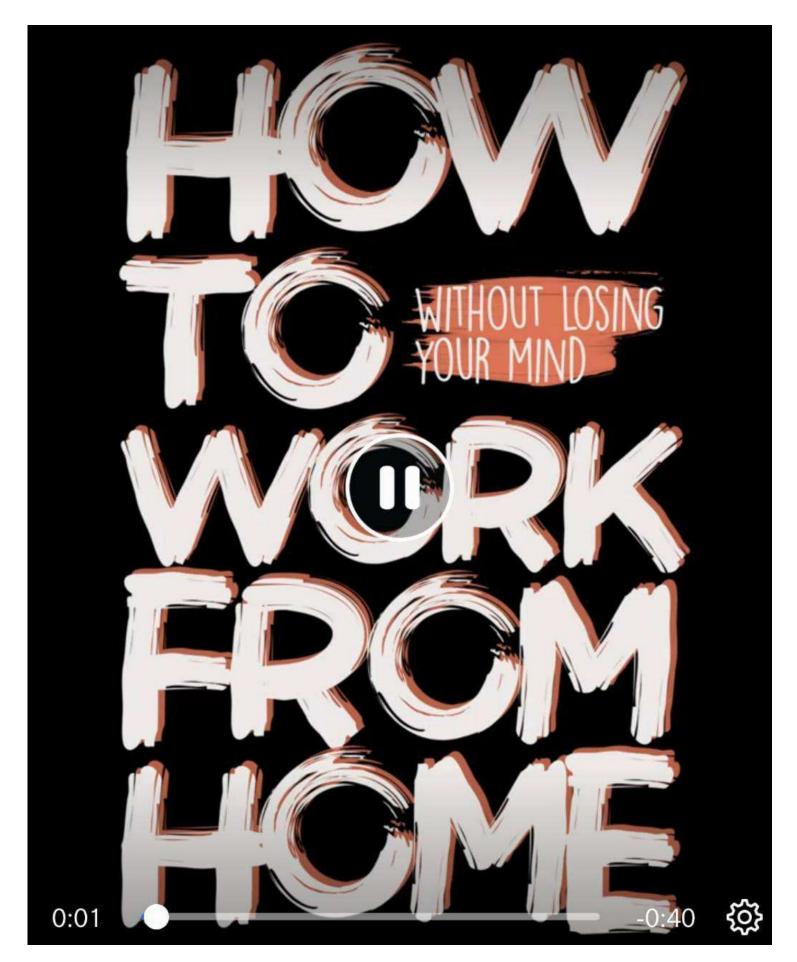
يصبّر القلب بالتفاؤل وقريبا تتبدّل الأحوال

فسبل التواصل عديدة من قال انقطع الاتصال!!

شريكنا Mobily@ ما يمنع لو تعطينا دقه وتقفل ، بس نطمن انك بخير ، وبالمرة اسأل عن شريكنا "الزين"



USING HOME-MADE AND MOTION GRAPHIC CONTENT





https://www.facebook.com/etisalatmisr/videos/213076170113669/

https://www.facebook.com/Kijamii/videos/218951676127945/



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